



Development Monitoring System Report

Howard County, Maryland

Prepared by
Howard County Department of Planning and Zoning

January 2002



DEPARTMENT OF PLANNING & ZONING

Joseph W. Rutter, Director

January 15, 2002

A Message from the Planning Director:

I am pleased to present the annual Development Monitoring System Report. This year's report is similar to last years, with the extensive use of maps and charts, to clearly depict and summarize recent development activity in the County. One difference with this year's report, resulting from the adoption of General Plan 2000, is the reporting of residential development by five planning areas rather than the six school regions. These new planning areas are consistent with General Plan projections and the amended Adequate Public Facilities Ordinance. Highlights to the report are noted on Page 2 of the Executive Summary.

Over the last five years there has been a average of about 2,000 new housing units built in the County. Housing development slowed last year, however, to levels below this average with only 1,904 use and occupancy permits and 1,604 building permits issued. This is a reduction from the previous year, which was a five year high, when there were 2,494 use and occupancy permits and 2,418 building permits issued. This reduced level is likely to continue in the years ahead reflecting the new APFO growth limits.

Non-residential development activity has remained high for the year with 3.3 million square feet in issued building permits. This is consistent with the five year average of about 3.2 million square feet in issued permits per year. However, the first six months of the October 1, 2000 to September 30, 2001 reporting period were prior to the recession beginning in March, and there are signs of some slowing. There are only about 1 million square feet in in-process site development plans compared to 2.7 million square feet in process the previous year. This reduction is due to the large amount of current building capacity in a slowing economy. As the economy rebounds and this capacity is filled the pace of new building activity will be impacted. While the extent of this impact is unknown, an immediate return to the rapid growth of the late 1990's is unlikely. Rather, as indicated in General Plan 2000, it is likely that more moderate growth rates will continue.

Sincerely,

Joseph W. Rutter
Director

Development Monitoring System Report

Date Issued:

January 2002

Reporting Period:

October 1, 2000 to September 30, 2001
With countywide summaries from October 1, 1996

Produced by:

Howard County Department of Planning and Zoning
Division of Research

Howard County Department of Planning and Zoning:

Joseph W. Rutter, Director
Marsha S. McLaughlin, Deputy Director
Carl Balser, Chief, Division of Transportation Planning
George Beisser, Chief, Division of Public Service and Zoning
Administration
Jeffrey P. Bronow, Chief, Division of Research
Charles F. Dammers, Chief, Division of Development Engineering
Elmina Hilsenrath, Chief, Division of Environmental and Community
Planning
Cynthia Hamilton, Chief, Division of Land Development

Division of Research - Contributing Staff:

Sharon Melis
David Dell
Carrie Grosch
Jane Hoffman
Michael White

County Executive:

James N. Robey

County Council:

C. Vernon Gray, Chairman
Mary C. Lorsung, Vice Chairperson
Guy Guzzone,
Allan H. Kittleman
Christopher Merdon
Sheila Tolliver, *Executive Secretary*

Planning Board:

Joan C. Lancos, Chairperson
Gary L. Kaufman, Vice Chairman
Haskell N. Arnold
Florenzia W. Davis
J. Landon Reeve, IV
Joseph W. Rutter, *Executive Secretary*
Paul T. Johnson, *Deputy County Solicitor*

For More Information:

Howard County Department of Planning and Zoning
Research Division
3430 Court House Drive
Ellicott City, Maryland 21043
(410) 313-4370
e-mail: Planning@co.ho.md.us

Table of Contents

Executive Summary

Adequate Public Facilities Act	1
Highlights	2
Residential Development	2
Preservation	2
Non-Residential Development	3
Residential Development	3
Development Activity	3
Development Location	4
Plans In Process	4
Plans in Process by Location	7
Land Preservation	7
Non-Residential Development	10
Job Growth	10
Development Activity	11
Development Location	11
Plans In Process	14

Residential Development

Recorded Residential Subdivisions	17
Summary of Last Year's Result	17
Last Year's Projects - Greater than 30 Lots	18
Five Year Results	20
Last Year Compared to Five Year Trends	21
In-Process Residential Subdivisions	22
Number of Plans	22
Number of Potential Units	22
Number of Acres	24
Major Projects	24
Approved Residential Site Development Plans	27
Summary of Last Year's Results	27
Last Year's Projects - Greater than 30 Units	28
Five Year Results	28
In Process Residential Site Development Plans	31
Number of Plans	31
Number of Potential Units	31
Number of Acres	32
Major Projects	32

Residential Building Permits & Use and Occupancy Permits ·····	35
Issued Building Permits ·····	35
Use and Occupancy Permits ·····	38
Housing Unit Allocations ·····	41
Potential Population ·····	43
Population Estimates from Recorded Subdivisions ·····	43
Population Estimates from Issued Building Permits ·····	44
Population Estimated from Use and Occupancy Permits ·····	45
Housing Sales ·····	46
Land Preservation ·····	49
Agricultural Land Preservation Program ·····	49
Dedicated Easement Properties ·····	49
Total Preserved Land in the Rural West ·····	50

Number of Lots ·····	68
Number of Acres ·····	69
Building Floor Space ·····	69
Major Projects ·····	69
Non-Residential Building Permits ·····	72
Summary of Last Year's Results ·····	72
Last Year's Permits - Greater Than 50,000 Square Feet ·····	72
Five Year Results ·····	73
Employment Estimates ·····	78
Estimated Employment from Site Development Plans ·····	78
Estimated Employment from Building Permits ·····	79
State of Maryland Employment Estimates ·····	80

Non-Residential Development

Recorded Non-Residential Subdivisions ·····	53
Summary of Last Year's Results ·····	53
Last Year's Projects - Greater than 50 Acres ·····	54
Five Year Results ·····	54
In-Process Non-Residential Subdivisions ·····	58
Number of Plans ·····	58
Number of Lots ·····	58
Number of Acres ·····	59
Major Projects ·····	59
Approved Non-Residential Site Development Plans ·····	62
Summary of Last Year's Results ·····	62
Last Year's Projects - Greater than 100,000 Square Feet ·····	63
Five Year Results ·····	63
In-Process Non-Residential Site Development Plans ·····	68
Number of Plans ·····	68

Executive Summary

Adequate Public Facilities Act

The Adequate Public Facilities Act of 1992, expressed "the need to provide a growth management process that will enable the County to provide adequate public roads and schools in a timely manner and achieve General Plan growth objectives. This process is designed to direct growth to areas where an adequate infrastructure exists or will exist."

Section 16.1108 of the Adequate Public Facilities Act directs that "The Department of Planning and Zoning will monitor the growth of housing and employment in Howard County and shall issue reports which indicate:

- (1) Subdivision plans and site development plans approved during the last several years, including number of residences or the number of new employees projected for the approved subdivisions and land developments.
- (2) Subdivision plans and site development plans in-process at the time of the report, including the number of housing unit allocations or the number of new employees projected for the proposed subdivisions and land development.
- (3) Building permits and certificates of occupancy issued during the last several years, indicating the number of dwelling units and the projected number of new employees for which building permits or certificates of occupancy were issued."

This is the tenth annual Development Monitoring System report prepared by the Department of Planning and Zoning. The report tabulates and analyzes recent and current development activity at each stage of the County's land development review and approval process. These stages include subdivision plans, site development plans, building construction permits and use and occupancy permits.

Both approved and currently in-process land development plans are tabulated. Annual data for development activity are reported for the period October 1 through September 30 for the past five years beginning in October 1, 1996. More detailed information is reported for the most current year, October 1, 2000 to September 30, 2001. The report is divided into Residential and Non-Residential parts.

The section below discusses the highlights in this year's report. The following sections discuss the residential and nonresidential findings in more detail providing comparison charts by development stage. The second and third parts of this report, beginning on Pages 17 and 53, respectively, provide even more detail within each stage of development as well as further explanation on the land development process in Howard County.

Highlights

Residential Development

- Over the last five years, residential building completions, measured by use and occupancy permits, have averaged about 2,000 new units per year.
- Last year, there were 990 lots recorded, 959 units approved in site development plans, 1,604 building permits issued and 1,904 use and occupancy permits issued. *All of these are lower than their respective five year averages:* 1,419 lots recorded, 1,449 units approved in site development plans, 2,130 issued building permits and 2,012 use and occupancy permits. This is a clear indication of slowing residential development activity.

- From the 1996/97 year to the 1999/00 year there had been annual increases in the numbers of issued building and use and occupancy permits – building permits increased each year from 2,065 in 1996/97 to 2,418 in 1999/00 and use and occupancy permits increased from 1,640 in 1996/97 to 2,494 in 1999/00. However last year this trend was broken with only 1,604 building permits issued and 1,904 use and occupancy permits issued.
- Countywide, last year about 72 percent of issued building permits were for single family detached units, 20 percent for townhouses and 8 percent for apartments.
- Last year about one-third of all permits were issued in Ellicott City, 24 percent in Columbia, 22 percent in the Rural West and 15 percent in Elkridge. The remaining 6 percent were issued in the Southeast.
- As of September 30, 2001 there were 7,025 units in the subdivision process. This represents all units in plans under review prior to being recorded and is 1,685 more units than the 5,340 units in process one year earlier (September 30, 2000). More than half of 7,025 units in process are part of phased plans, however, with building planned for future years as far out as 2015. The larger phased plans include Emerson and Maple Lawn in the Southeast and Turf Valley, Waverly, Mount Joy Farm and the Taylor properties in Ellicott City.
- Countywide, 50 percent of the units in process on September 30, 2001 were single family units. About 25 percent were single family attached units and another 25 percent were apartment units.

Preservation

- Last year, 796 acres of agricultural and environmentally sensitive land were permanently preserved. All of this preserved acreage is a result of subdivision activity using the Density/Cluster Exchange Options (DEO/CEO) and cluster subdivision zoning regulations.
- Since 1992, 8,323 acres have been subdivided in the West using the DEO/CEO and cluster subdivision zoning regulations. About 72 per-

cent of this total, 5,960 acres, has gone into preservation and permanent open space. The remaining 28 percent, 2,363 acres, has been or is planned for development on 1,869 lots and 212 acres of roadway.

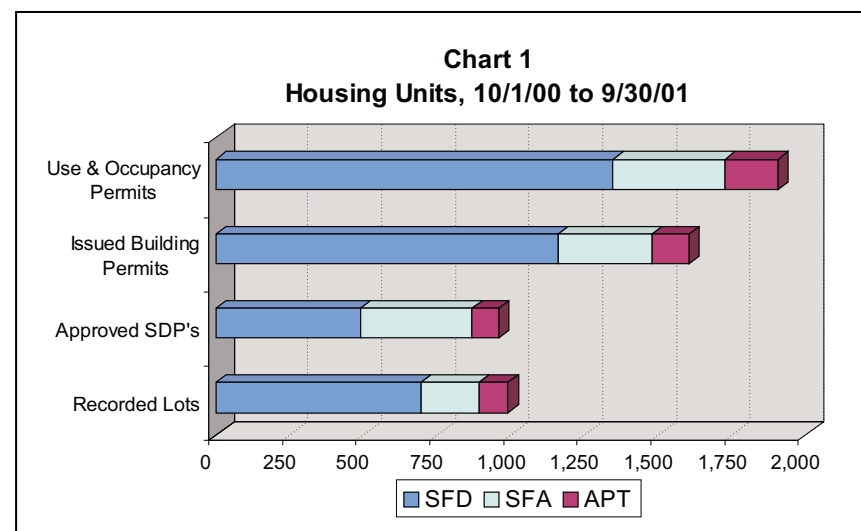
Non-Residential Development

- Last year, the State reported 5,874 new jobs in Howard County. This is slower growth compared to previous years, but still a relatively strong job growth level. Over the last 5 years, the State reports that 33,924 new jobs were created, an average of 6,785 per year.
- Based on building space in last year's approved site development plans an estimated 9,000 jobs could be accommodated. About 7,600 potential jobs could be accommodated based on last year's issued building permits. However, full realization of this potential depends on the economy. The current recession didn't begin until March, 2001, about half way through the current reporting period.
- Last year almost 3.9 million square feet of building space was approved in site development plans. Issued building permits accounted for about 3.3 million square feet. Over the last five years, the average annual amount was 3.4 million square feet in approved site development plans and 3.2 million square feet in issued building permits.
- Most of the new building space is located in Columbia and the I-95 Corridor. Comparably less space was planned in Ellicott City and the West.
- Most of the overall development is for office/service and manufacturing/extensive industrial uses. The office/service space is concentrated in Columbia whereas the manufacturing/extensive industrial space is concentrated in the I-95 Corridor.
- As of September 30, 2001, there was just over 1 million square feet in in-process site development plans. This is a significant reduction from the 2.7 million square feet in process for the previous year and is one indication of the slowing economy.

Residential Development

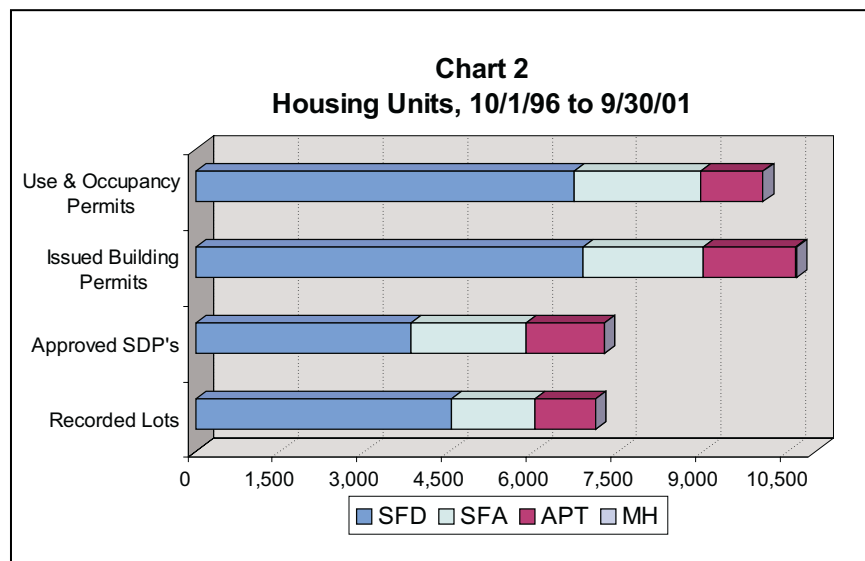
Development Activity

Chart 1 shows residential development activity from October 1, 1999 to September 30, 2000. Last year, a total of 1,904 use & occupancy permits and 1,604 building permits were issued. There were 959 units in approved SDP's and 990 units from recorded lots.



As indicated in Chart 2, for the five year growth period from October 1, 1996 to September 30, 2001, a total of 10,062 use & occupancy permits and 10,652 building permits were issued. This averages to 2,012 use and occupancy permits and 2,130 building permits issued per year over the five year time period. Over the five years, there were a total of 7,246 units in approved SDP's and 7,094 units from recorded lots. This results in a five year average of 1,449 and 1,419 units per year, respectively.

It is important to note that residential development in the County typically begins with the subdivision process where new lots are recorded, followed by the site development plan (SDP) process, and then the issuance of build-



ing and use & occupancy permits. However, not all recorded lots must go through SDP phase and not all units reflected in SDP's are units that went through the subdivision process.

Residential SDP's are required for all residential lots 20,000 square feet or less, slightly less than a half an acre.¹ Many lots, especially in the West, are larger than 20,000 square feet. Consequently, SDP's do not account for all residential growth in the County. Also, not all units in SDP's, such as apartment buildings on bulk parcels, go through the subdivision process. Furthermore, some lots that have been built on were recorded or in existence prior to 1996. Since all new housing units require building permits and ultimately use and occupancy permits, these measures more fully reflect actual development activity in the County. This also explains why the numbers of recorded lots and units in SDP's are less than the numbers of building and use & occupancy permits.

Development Location

Map 1 shows the development activity last year for each development stage by planning area. One difference with this year's report, resulting from the adoption of General Plan 2000, is the reporting of residential development by five planning areas rather than the six school regions. These new planning areas are consistent with General Plan projections and the amended Adequate Public Facilities Ordinance.

It is clear that much of the activity has been concentrated primarily in Ellicott City and Columbia and, to a lesser extent in the Rural West. There has been comparably less activity in Elkridge and the Southeast.

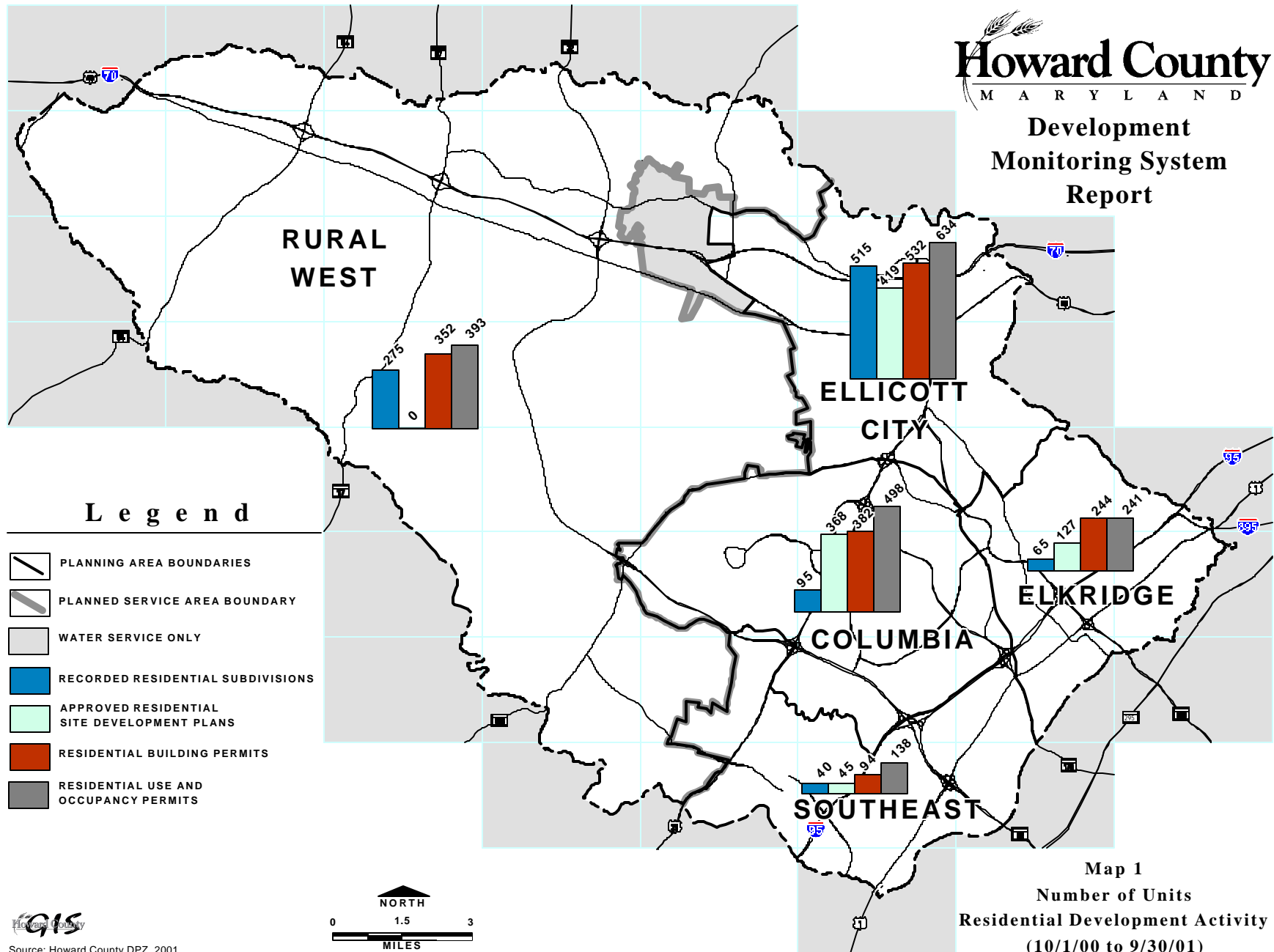
Map 2 shows the use & occupancy permits issued last year by unit type for each planning area. In addition to showing the unit type breakdown in each region, the size of the pie charts also reflect the relative number of issued permits.

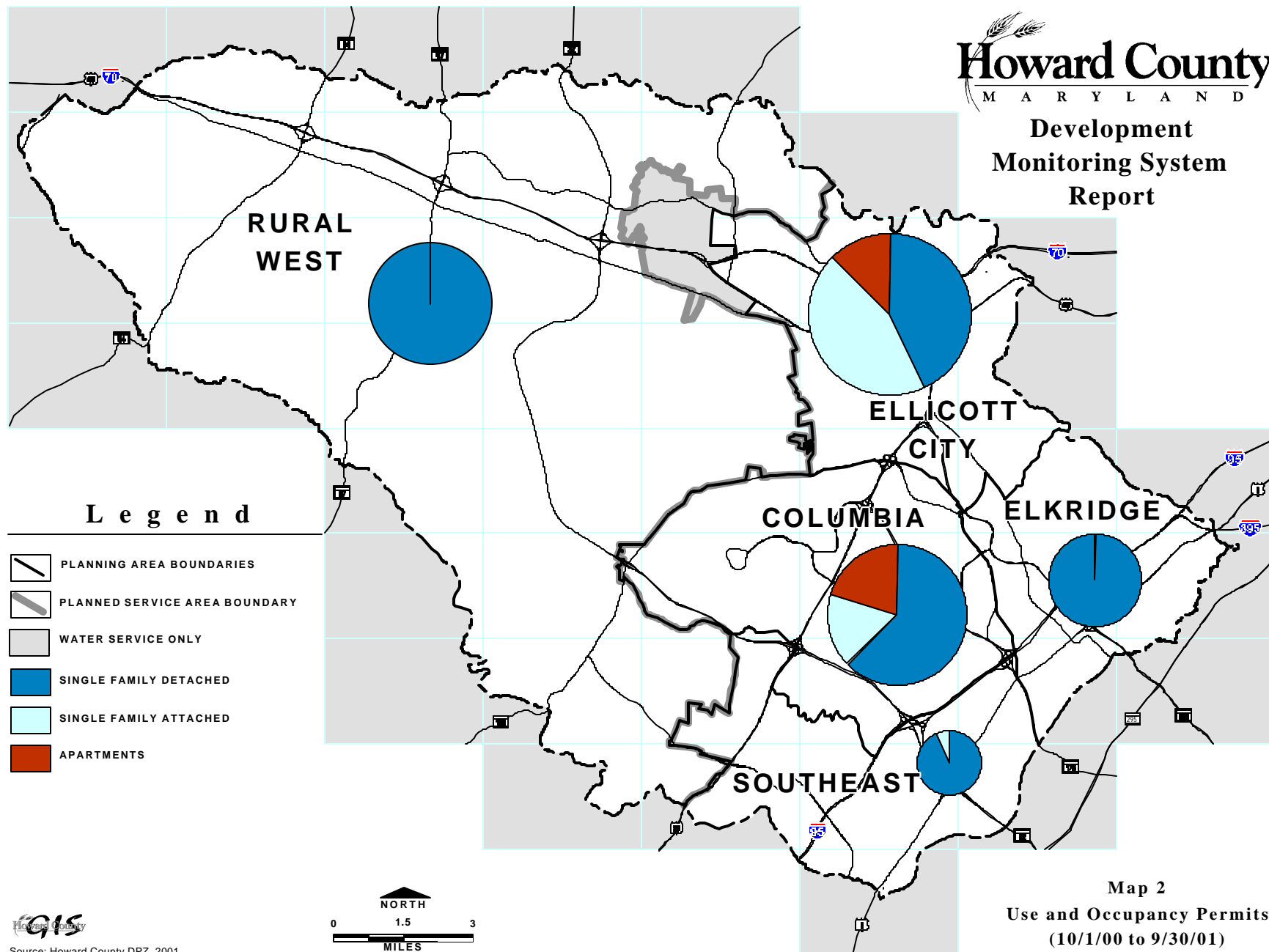
The overall Countywide breakdown of issued use & occupancy permits last year was 71 percent single family detached, 20 percent single family attached and 9 percent apartment units. The map clearly shows how this varies by planning area with virtually all of the permits for apartments and single family attached units being issued in Columbia and Ellicott City.

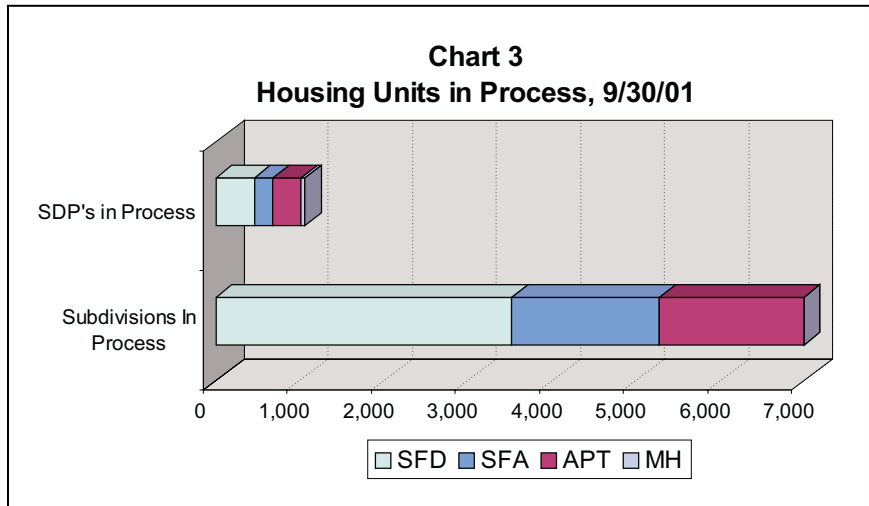
Plans In Process

Chart 3 shows the number of potential housing units that are in the subdivision and site development plan process. These are units in subdivision plans that are not yet recorded and site development plans that are not yet approved. As of September 30, 2001, there were 7,025 units in the subdivision process and 1,065 units in the site development plan process. For comparison purposes, for the previous year on September 30, 2000 there were 5,340 units in the subdivision process and 1,028 units in the site development plan process.

¹ Note that this has changed with recent amendments to the Subdivision Regulations effective January 8, 2002. The new regulations require site development plans for *all lots in the East*.







It is important to note that a significant number of the 7,025 potential units in the subdivision process are part of phased projects with building planned for future years. In fact, of the total 7,025 units, 3,758 are part of phased plans, with building planned as far out as 2015 (in the case of Maple Lawn). This represents more than half of all units in process. All of the phased projects are in the Southeast and Ellicott City. The larger projects include Emerson and Maple Lawn in the Southeast and Waverly, Turf Valley, the Taylor properties and Mount Joy Farm in Ellicott City.

Plans in Process by Location

Map 3 shows the in process plans distributed by location. Of the 7,025 potential units from subdivision plans in process, the Southeast had the greatest number with 2,954, 42 percent of the total. This is closely followed by Ellicott City with 2,683 units in process (38 percent). The Rural West had 731 units in process, followed by 591 in Elkridge and 66 in Columbia.

Of the 1,065 units in the site development plan process, 386 were in Ellicott City, 255 in Columbia, 194 in Elkridge, 133 in the Rural West and 97 were in the Southeast.

Map 4 shows the number of units in the subdivision plan process by unit

type for each planning area. On September 30, 2001 all planning areas had single family detached units in process. Most in process single family attached or townhouse units were in the Southeast, the location of three mixed use projects – Emerson, Maple Lawn and Cherry Tree. The Southeast also had a large number of apartment units in process, although Ellicott City had the most. Elkridge, Columbia and the Rural West only had single family units in process.

Countywide, 50 percent of the units in process on September 30, 2001 were single family units. About 25 percent were single family attached units and another 25 percent were apartment units.

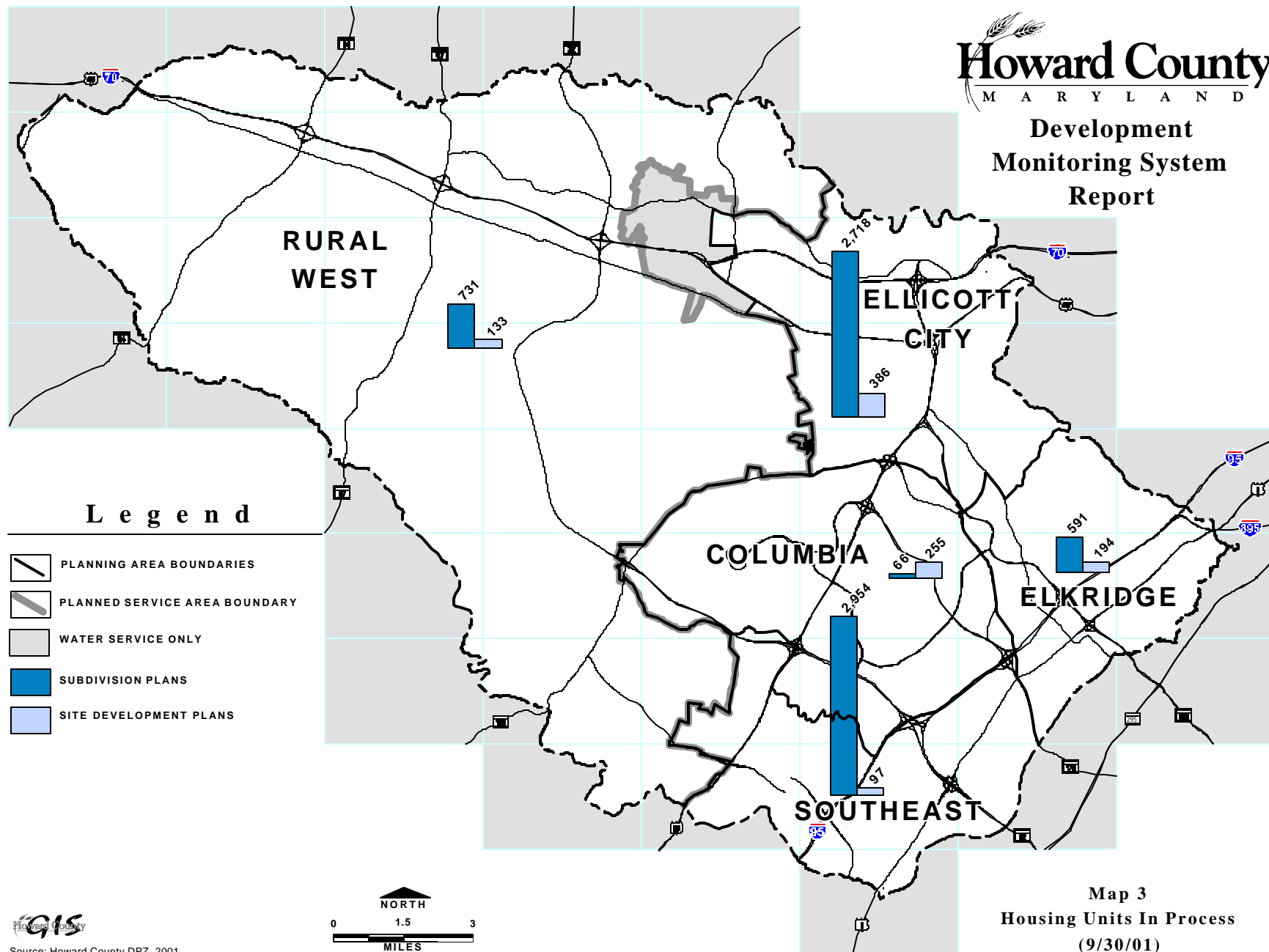
Land Preservation

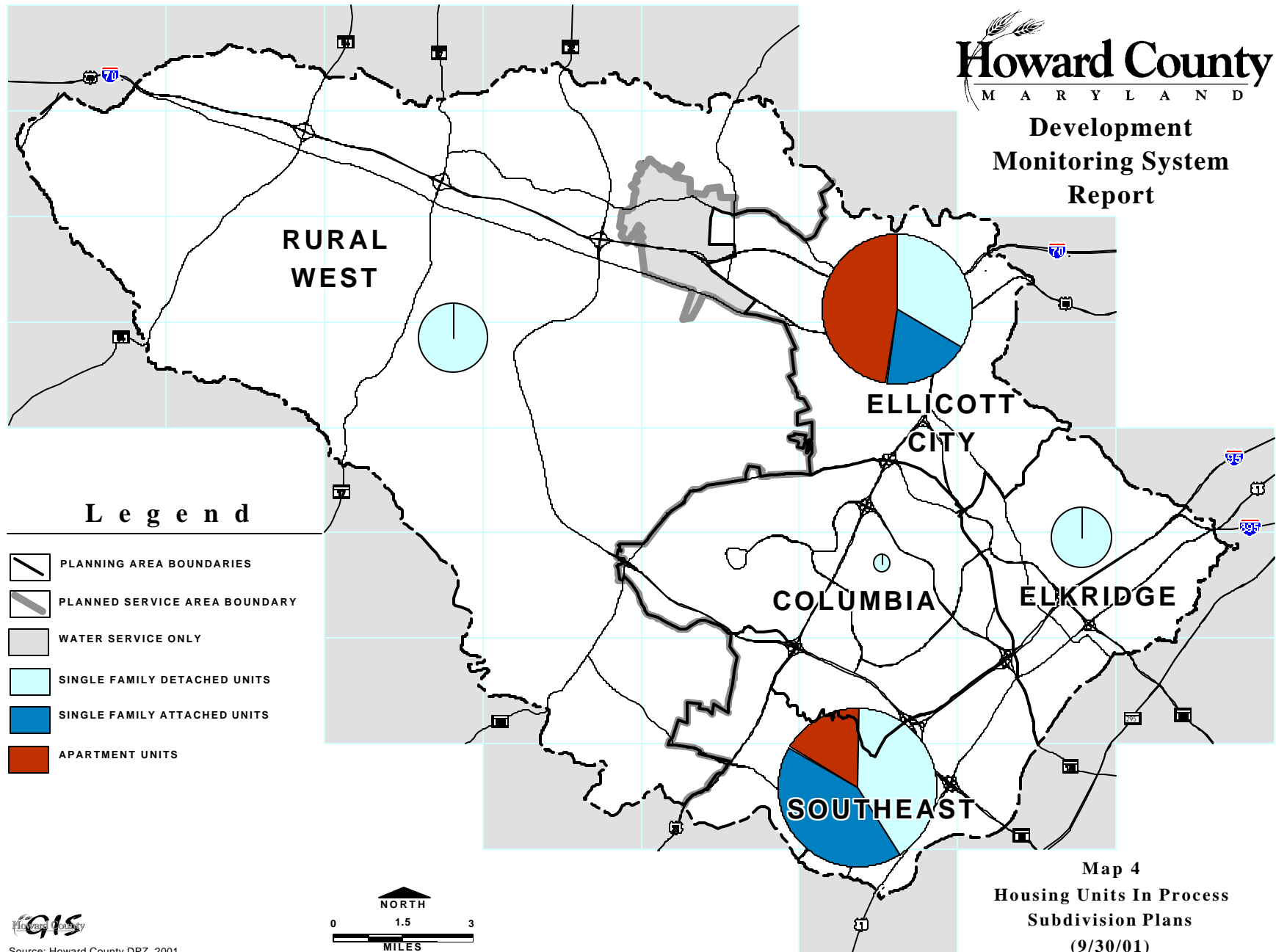
Last year, from October 1, 2000 to September 30, 2001, 285 acres of land were preserved and enrolled in Howard County's Agricultural Land Preservation Program. An additional 511 acres of land were dedicated as joint Howard County/Homeowner's Association preservation parcels resulting in a total of 796 permanently preserved acres. All of this preserved acreage was a result of subdivision activity using the Density/Cluster Exchange Options (DEO/CEO) and cluster subdivision zoning regulations.

Since 1992, 8,323 acres have been subdivided in the West using the DEO/CEO and cluster subdivision zoning regulations. About 72 percent of this total, 5,960 acres, has gone into preservation and permanent open space. The remaining 28 percent, 2,363 acres, has been or is planned for development on 1,869 lots with 212 acres of roadway.

To date, there are about 18,370 acres of permanently preserved agricultural land in the Rural West and about 3,971 acres preserved as other easement types, for a total of 22,341 acres. This is about 24 percent of the approximate 94,600 total acres of land in the Rural West.

Including County and State parks and open space and WSSC land (9,300 acres), permanent historic easements (130 acres) and other environmental easements (940 acres) the total preserved land amounts to 32,700 acres, about 35 percent of all land in the Rural West. Please refer to the Land Preservation Section, Page 49, for further details.





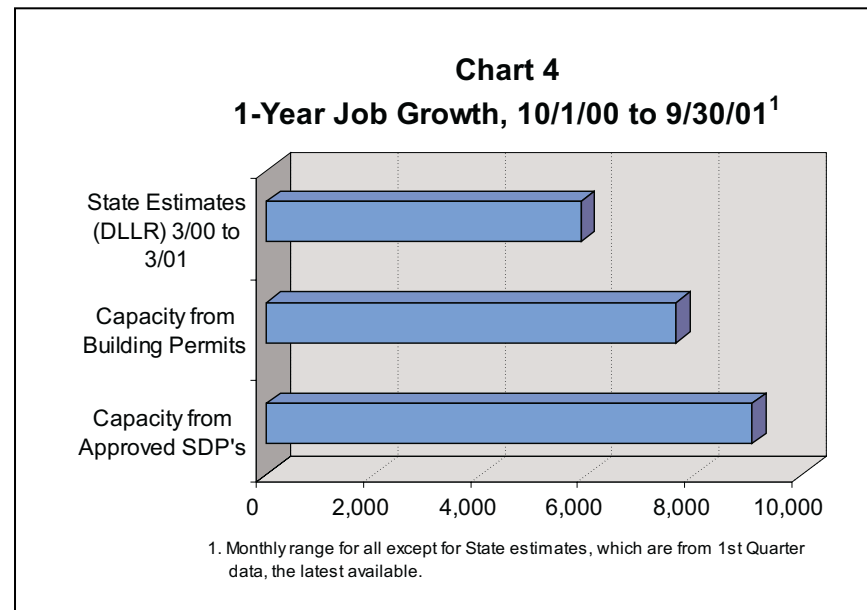
Non-Residential Development

Job Growth

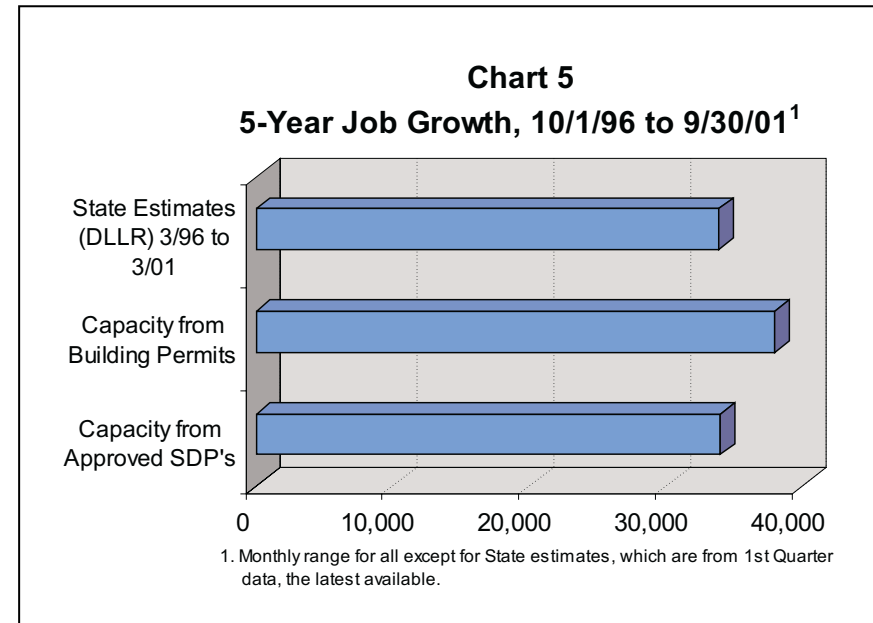
Charts 4 and 5 show potential employment from approved site development plans and issued building permits compared to actual job growth based on estimates from the State Department of Labor, Licensing and Regulation (DLLR).

Potential employment growth from approved site development plans and building permits has been estimated based on information provided by the employer or as indicated on the plan. In some cases, calls were made to prospective employers. Where this information was not available a generalized ratio of employees to square footage was used. This ratio varies depending upon the category of non-residential use (retail, office/service, manufacturing/extensive industrial and government/ institutional).

The one-year job growth estimates from the State from first quarter 2000 to first quarter 2001 indicate that there were 5,874 new jobs added to Howard



County. Job growth as reported by the State over the five year period totals 33,924 new jobs. On average, this is a net gain of 6,785 new jobs per year reflecting the strong local and regional economies over this time period. It is important to note that last year's job growth, however, was slower than the five year average. And since the one-year time period is only through the first quarter of 2001, much of the economic downturn in 2001 would not be included in this statistic.



The potential jobs estimates from issued building permits and site development plans last year are 7,643 and 9,072 new jobs, respectively. If the new building capacity from this development activity continues to be utilized and vacancy rates don't substantially increase, this is an indicator that the County is poised to experience continued strong job growth, at least over the short term.

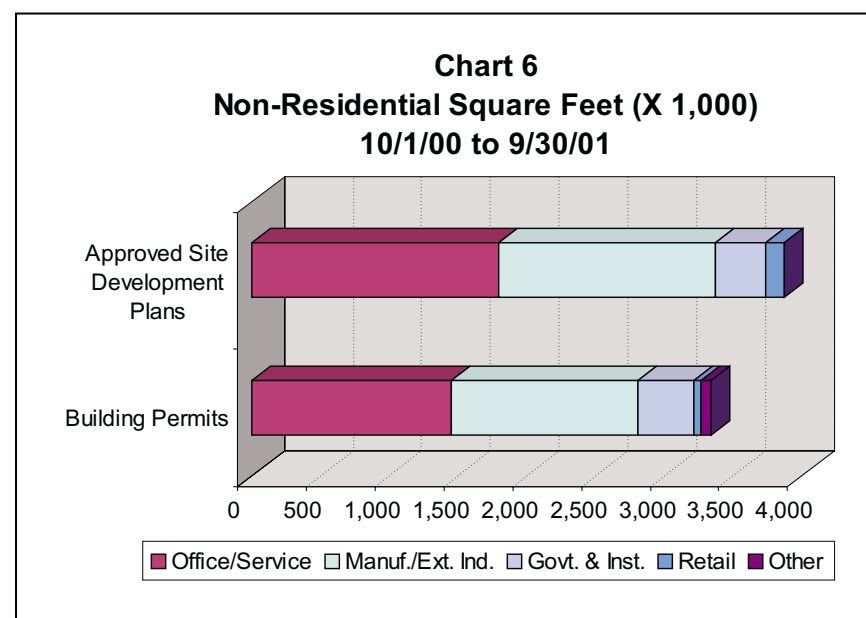
Whether this happens or not and approved building space gets built and fills up depends on the economy. Vacancy rates in Howard County have risen over the last year, and there have been cases where new buildings

have not been leased fully or at all. However, it appears that this is not a *major* problem at this time, particularly compared to glut of non-utilized building space created in the region before the last recession in the early 1990's. Whether or not employment will continue to grow at recent levels remains to be seen, but based on last year's SDP approvals and issued building permits the County has the *potential* for continued growth in the immediate future.

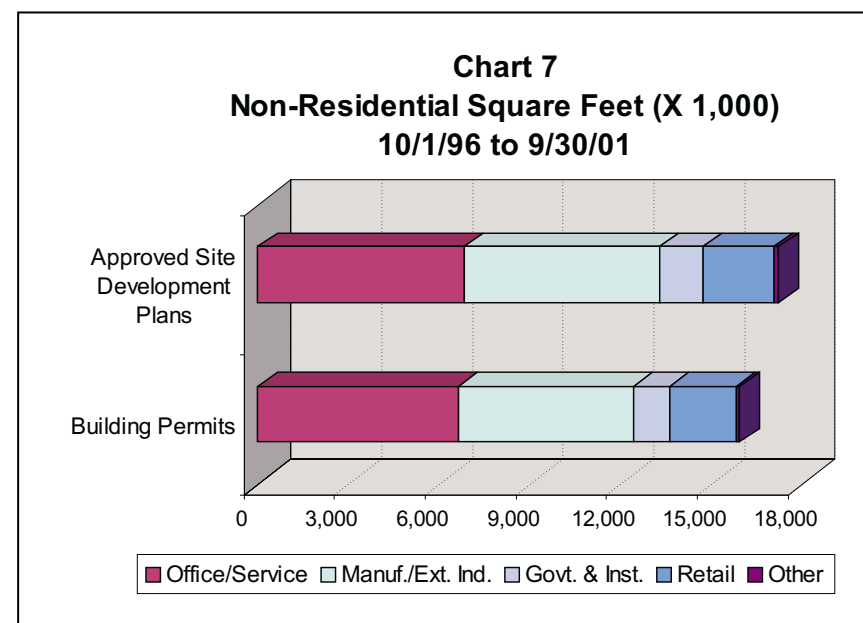
Development Activity

Last year, from October 1, 2000 to September 30, 2001, almost 3.9 million square feet of building space were approved in site development plans. Building permits were issued for a little more than 3.3 million square feet. Most of the space was for office/service space, followed by manufacturing/extensive industrial space. Retail and governmental & institutional development were comparably less (Chart 6).

Chart 7 shows the results for the five year period from October 1, 1996 to September 30, 2001. During this time period about 17.2 million square feet were approved in site development plans and 15.9 million square feet

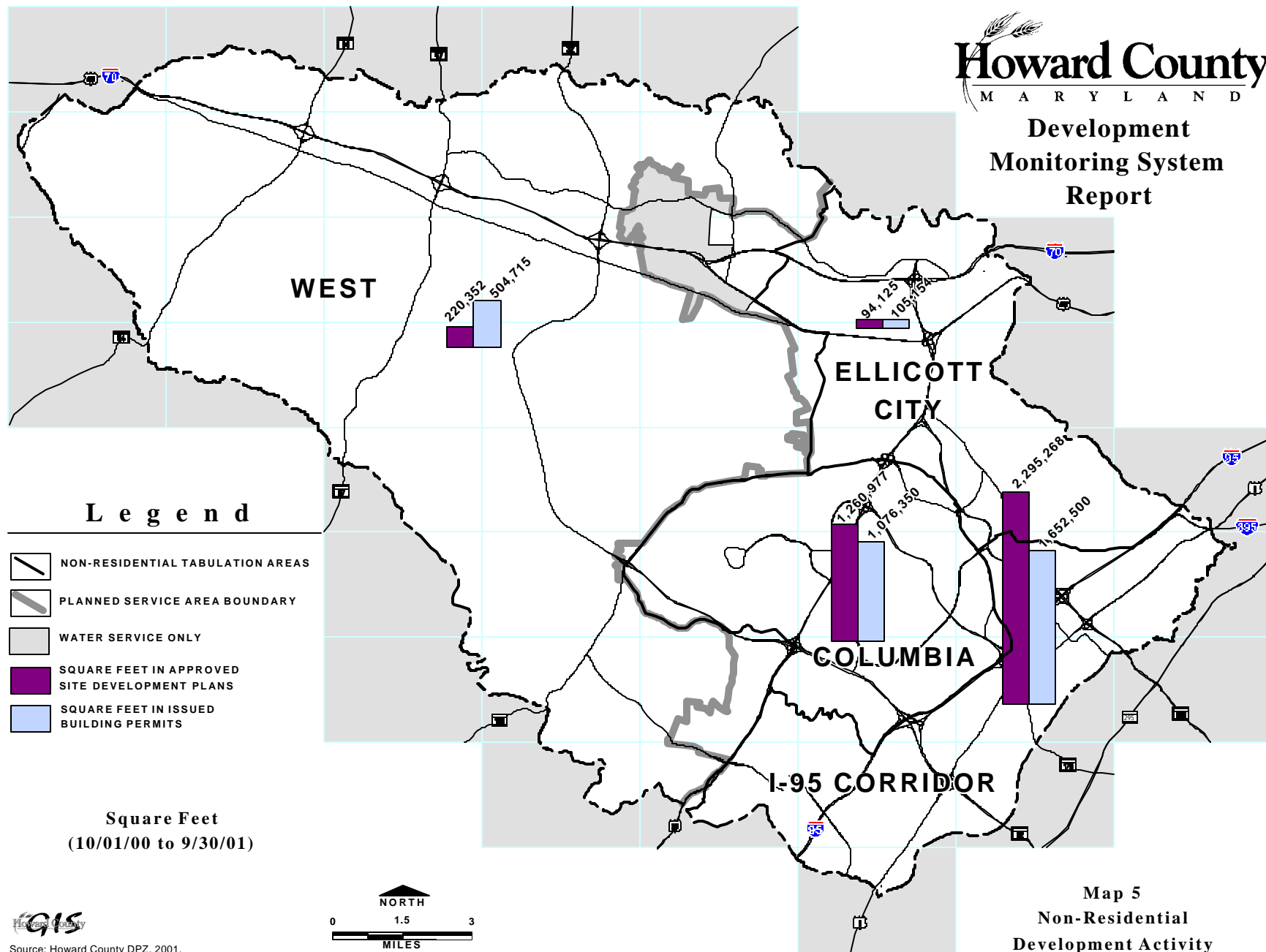


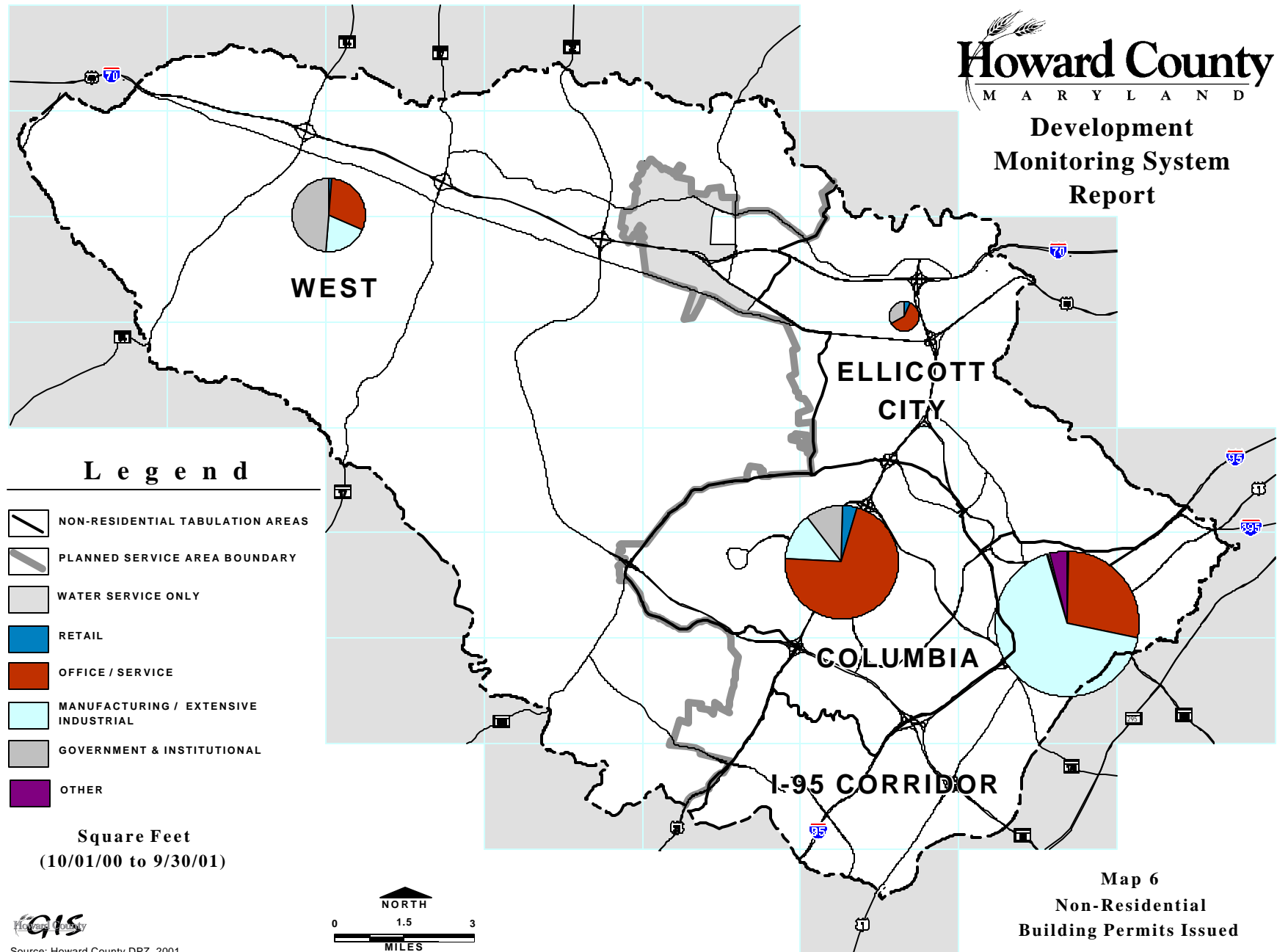
in issued building permits. These represent averages of about 3.4 and 3.2 million square feet per year, respectively. Similar to the one year time period, most of the new building space over the five years was for office/service uses closely followed by manufacturing/extensive industrial uses. Retail and government & institutional development were comparably less.



Development Location

Map 5 shows the one year total square footage by location for both building permits and approved site development plans. The map clearly indicates that most of the non-residential development activity has been concentrated in Columbia and the I-95 Corridor. Smaller amounts of non-residential development have occurred in Ellicott City and the West. About half of the building permit square footage in the West was for school construction for the new Reservoir High School and Alternative Learning Center as well as additions to Centennial High School.





Map 6 shows the total square footage in issued building permits for the last year by type of development for each region. In addition to showing the building type breakdown in each region, the size of the pie charts also reflect the relative square footage in the issued permits. The overall Countywide square footage breakdown for permits issued last year is about 43 percent office/service space, 41 percent manufacturing/extensive industrial space, 12 percent government & institutional space and about 2 percent each for retail and other uses.

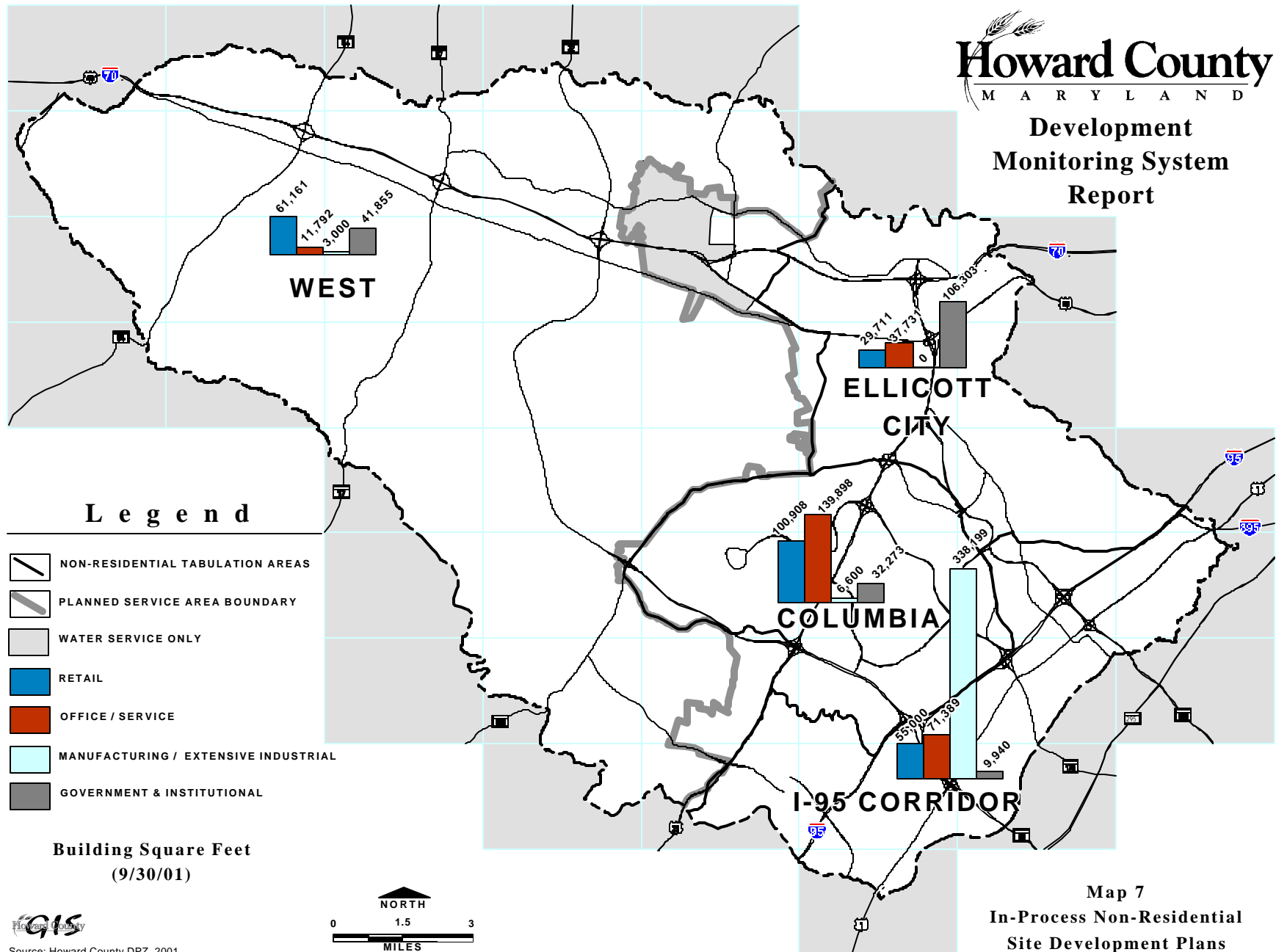
The map clearly shows how this varies by region with higher concentrations of office/service space in Columbia and a higher concentration of manufacturing/extensive industrial uses in the I-95 Corridor. The Columbia region includes Gateway, where most of the new office development has been located.

Plans In Process

Map 7 shows the amount of non-residential building square footage in the site development plan process by location and by type of development. As of September 30, 2001, there was just over 1 million square feet in process. This compares to a much larger 2.7 million square feet in process for the previous year (as of September 30, 2000). This reduction can be seen as a reflection of the slowing economy as well as the fact that the larger employment campuses like Gateway and Troy Hill are close to being complete.

Most of the in process-building space is in the I-95 Corridor. This is followed by planned space in Columbia. Ellicott City and the West had the least amount of planned building space.

Countywide, about 33 percent of the building space in the site development plan process is manufacturing/extensive industrial space. About 25 percent is office/service space and 24 percent retail space. The remaining 18 percent is government & institutional space.



Residential Development

Recorded Residential Subdivisions

The development process in Howard County usually begins with the subdivision of land. Depending upon the size and type of subdivision, the process may include:

- a three-phase subdivision plan review process: sketch plan, preliminary plan, and final plan;
- an accelerated review: preliminary equivalent sketch plan and final plan;
- a minor subdivision review (four buildable lots or less) involving only a final plan.

Upon final subdivision plan approval, lots can be recorded. It is important to note that not all new housing units in the County, such as apartment buildings on existing parcels, go through the subdivision process. Furthermore, some lots that have been built on were recorded or in existence prior to 1996, the first year of this current DMS analysis period. Therefore, the number of recorded lots do not reflect all development activity in the County over the current reporting period.

For this report, the number of residential *plans* recorded, the number of potential *units* from recorded lots, and the *acreage* of plans recorded have been compiled by the planning areas shown on Map 8. (Note that with the adoption of General Plan 2000 in November 2000 there are now *five* planning areas. In prior years, there were six planning regions which were the same as the six school regions.) Annual data for development activity are reported for the period October 1 through September 30.

Summary of Last Year's Result

Last year there were 990 housing units from recorded lots countywide in 139 subdivision plans totaling 2,777 acres (Table 1). Ellicott City had more than half of the total units with 515, or 52 percent of the total. The Rural West had close to 28 percent of the total with 275 units. The remaining 200 units were in Columbia, Elkridge and the Southeast planning areas. These represent *net new unit* potential and do not

include total recordations from resubdivisions. For example, in a few cases resubdivisions combine existing lots to create a smaller number of new lots compared to the original.

Of the total 139 subdivision plans recorded last year, 45 percent were in the Rural West, followed by 24 percent in the Ellicott City. The remaining 31 percent of plans were in Elkridge, the Southeast and Columbia.

Of the total 2,777 acres recorded, 2,179 acres, or about 78 percent, were in the Rural West. It should be noted, however, that of the 2,179 recorded acres in the West, 639 acres (29 percent) were for plats sending density as part of the density and cluster exchange subdivision process. Also, the recorded acres for all areas include resubdivisions.

Table 1
Recorded Residential Subdivisions, 10/01/00 to 9/30/01

Planning Area	Units		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	95	10%	12	9%	64	2%
Elkridge	65	7%	16	12%	141	5%
Ellicott City	515	52%	34	24%	342	12%
Rural West	275	28%	63	45%	2,179	78%
Southeast	40	4%	14	10%	51	2%
TOTAL	990	100%	139	100%	2,777	100%

Table 2
Unit Potential from Recorded Lots by Unit Type, 10/01/00 to 9/30/01

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	95	0	0	0	95	10%
Elkridge	65	0	0	0	65	7%
Ellicott City	219	198	98	0	515	52%
Rural West	275	0	0	0	275	28%
Southeast	40	0	0	0	40	4%
TOTAL	694	198	98	0	990	100%
PERCENT	70%	20%	10%	0%	100%	

Chart 8
Recorded Lots by Unit Type - New Unit Potential
10/1/00 to 9/30/01

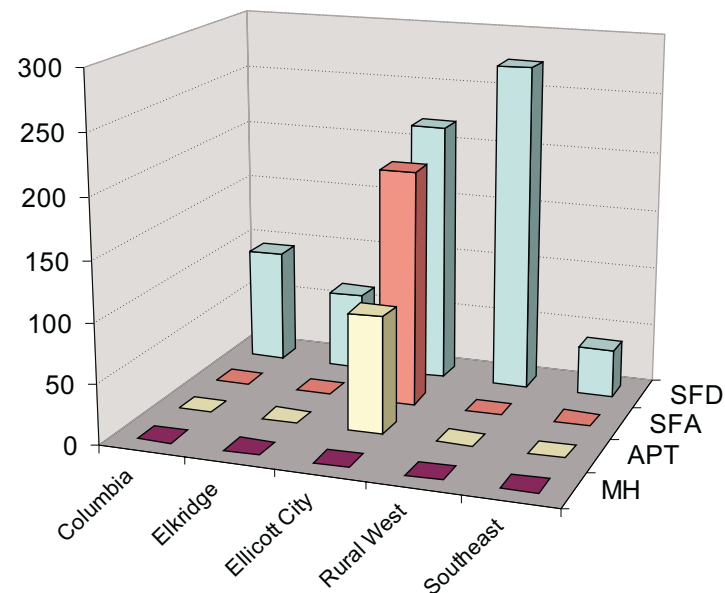


Table 2 shows new units from recorded lots by unit type. Of the 990 recorded lots, 694 are for single family detached units (SFD), 198 are for single family attached or townhouse units (SFA) and the remaining 98 are for apartment units. This represents 70, 20 and 10 percent of the total units, respectively. There were no mobile home units recorded last year. Chart 8 shows these results graphically.

Last Year's Projects - Greater than 30 Lots

Of the total 990 units from lots recorded last year, 652 or about 66 percent were in subdivisions consisting of more than 30 units. These larger subdivisions, shown in Table 3, are located in three of the five regions – Columbia, Ellicott City and the Rural West. The precise location of these plans are shown on Map 8.

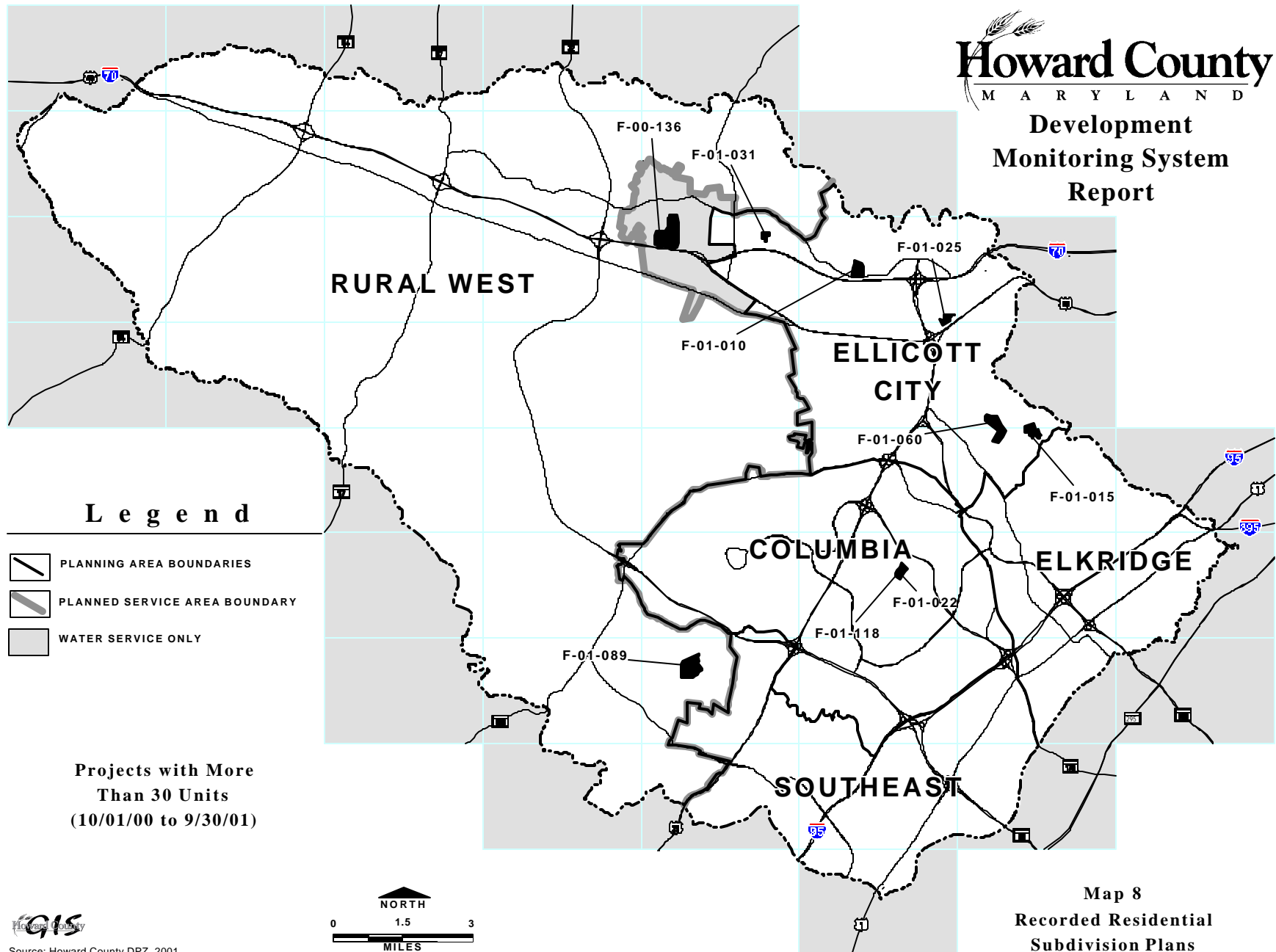


Table 3
Recorded Residential Subdivision Plans, Projects With More Than 30 Units, 10/01/00 to 9/30/01

Planning Area	File Number	Plan Name	Unit Type	Lots	Total
Columbia	F-01-022	Eckers Hollow	SFD	56	89
	F-01-118	Eckers Hollow	SFD	33	
Ellicott City	F-01-025	Kaiser Farm	SFA	176	438
	F-01-031	GTW'S Waverly Woods	SFA	120	
	F-01-015	Autumn View	SFD	56	
	F-01-010	Treyburn (Formerly Harbin Property)	SFD	44	
	F-01-060	Worthington Fields	SFD	42	
Rural West	F-00-136	The Estates At Sand Hill	SFD	78	125
	F-01-089	Pindell Woods	SFD	47	
TOTAL					652

Of the 95 units from recorded lots in Columbia last year, almost all of them (89) were for single family detached units in Eckers Hollow. In Ellicott City, 438 of the total 515 lots, or 85 percent, were in subdivisions with more than 30 units. These lots are located in the Kaiser Farm, Waverly Woods, Autumn View, Treyburn and Worthington Fields subdivisions. In the West, 125 of the total 275 lots, or 45 percent, were recorded in larger subdivisions. These include units in the Estates at Sand Hill and Pindell Woods.

Five Year Results

Table 4 shows the recorded subdivisions for the last five years from October 1, 1996 to September 30, 2001. Over this five year period lots for 7,094 units countywide in 757 subdivision plans totaling 15,603 acres were recorded. This equates to a five year average of 1,419 units per year. Note that the acreage recorded figure represents all residential acreage including resubdivisions and sending and receiving preservation parcels.

Given that the planning areas changed this year as a result of the adoption of General Plan 2000, comparisons by planning area are not available. Please refer to past year's DMS reports for details by the old planning areas.

Table 5 summarizes the number of units from recorded lots by unit type for each of the last five years. Over the last five years, recorded lots created the potential for 4,537 single family detached units, 64 percent of the total 7,094. A total of 1,480, 21 percent, were single family attached units and the remaining 1,077, 15 percent, were for apartments units. (As indicated earlier, these represent *net new unit* potential from recordations and do not include totals from resubdivisions.) Chart 9 is a graphical representation of recorded lots by unit type over the last five years.

Table 4
Recorded Residential Subdivisions, 10/01/96 to 9/30/01

Year	Units	Plans	Acreage
10/96 to 9/97	2,936	153	3,956
10/97 to 9/98	983	115	2,132
10/98 to 9/99	1,393	182	4,077
10/99 to 9/00	792	168	2,661
10/00 to 9/01	990	139	2,777
TOTAL	7,094	757	15,603
5 YEAR AVG.	1,419	151	3,121

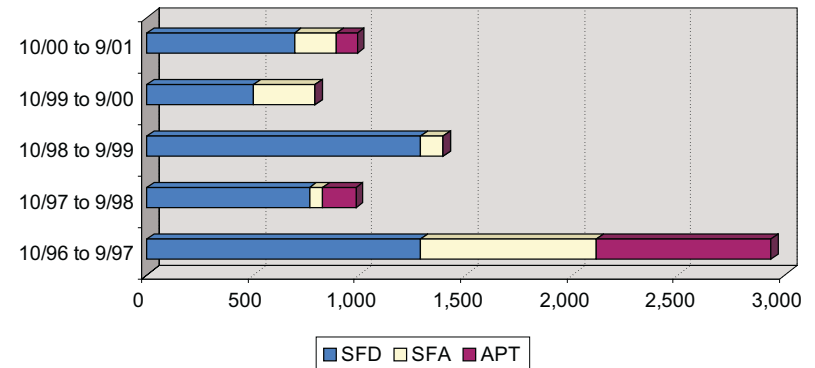
Table 5
Unit Potential From Recorded Lots by Unit Type, 10/01/96 to 9/30/01

Year	SFD	SFA	APT	MH	Total
10/96 to 9/97	1,286	828	822	0	2,936
10/97 to 9/98	765	61	157	0	983
10/98 to 9/99	1,289	104	0	0	1,393
10/99 to 9/00	503	289	0	0	792
10/00 to 9/01	694	198	98	0	990
TOTAL	4,537	1,480	1,077	0	7,094
PERCENT	64%	21%	15%	0%	100%
5 YEAR AVG.	907	296	215	0	1,419

Last Year Compared to Five Year Trends

Last year resulted in the third smallest number of new units from recorded lots with 990. This compares to 792, 1,393, 983 and 2,936 units for each of the 4 previous years, respectively, and is about 70 percent of the 1,419 five year average.

Chart 9
Recorded Lots by Unit Type - New Unit Potential
10/1/96 to 9/30/01



In-Process Residential Subdivisions

As indicated in the previous section, the development process in Howard County usually begins with the subdivision of land. Depending upon the size and type of subdivision, the process may include:

- a minor subdivision review;
- a three-phase subdivision plan review process: sketch plan, preliminary plan, and final plan;
- an accelerated review: preliminary equivalent sketch plan and final plan.

This section summarizes residential subdivisions in process, the development stage prior to recordation. Subdivision plans in four stages (sketch, preliminary equivalent sketch, preliminary, and final) are reported. The number of plans, potential units and acreage currently being processed as of September 30, 2001 are tabulated and compared with those in process a year earlier (as of September 30, 2000).

Note that since the five planning areas are new this year and do not compare to the six regions used in the past, detailed comparisons by area are not included. Refer to past year DMS reports for location specifics.

Number of Plans

Thirty-nine more residential plans were in process as of September 30, 2001 than there were one year earlier – 190 plans in 2001 compared to 151 plans in 2000 (Table 6).

For the current year, Ellicott City had the greatest number of residential plans in process with 61, followed by the Rural West with 52. The Southeast and Elkridge had 33 and 32 plans in process, respectively. Columbia had only 12 plans in process.

Of the 190 plans in process on September 30, 2001, 112 were final plans, 48 were sketch plans, 19 were preliminary plans and 11 were preliminary equivalent sketch plans.

Table 6
Number of Residential Subdivision Plans in Process, 09/30/01
(With comparisons to Countywide total as of 09/30/00)

Planning Area	Preliminary Equivalent				TOTAL PLANS
	Sketch	Sketch	Preliminary	Final	
Columbia	3	1	2	6	12
Elkridge	7	1	4	20	32
Ellicott City	12	6	6	37	61
Rural West	18	1	5	28	52
Southeast	8	2	2	21	33
TOTAL	48	11	19	112	190
As of 09/30/00	31	7	20	93	151

Number of Potential Units

Similar to the number of plans, there were more potential units in process as of September 30, 2001 compared to a year earlier, 7,025 units compared to 5,340 units (Table 7). The Southeast had the largest number of units in process in 2001 with 2,954, or 42 percent, of the countywide total. This is followed closely by Ellicott City with 2,683 units in process (38 percent). The Rural West, Columbia and Elkridge planning areas had the remaining 1,388 units in process (20 percent). The large number of units in the Southeast are from the two large phased projects there, Maple Lawn and Emerson.

It is important to note that a significant number of the 7,025 potential units in process are part of phased projects with building planned for future years. As shown in Table 8, 3,758 units are part of phased plans, with building planned as far out as 2015 (in the case of Maple Lawn). This represents 53 percent of the total units in process. All of the phased projects are either in the Southeast or Ellicott City. The larger phased projects include the Key Property (Emerson) and Maple Lawn in the Southeast and Waverly, Turf Valley, the Taylor properties and Mount Joy Farm in

Ellicott City.

As reflected in Table 7, 50 percent of the units in process are single family detached units. About 25 percent are single family attached units and another 25 percent are apartment units. Table 9 shows details by plan stage and unit type for this year by planning area. Chart 10 graphically illustrates the units in process by unit type for each planning area.

Table 7
Number of Potential Units from Subdivision Plans in Process, 09/30/01
(With comparisons to Countywide total as of 09/30/00)

Planning Area	Single Family Detached	Single Family Attached	Apartment	Mobile Homes	TOTAL UNITS
Columbia	66	0	0	0	66
Elkridge	591	0	0	0	591
Ellicott City	908	519	1,256	0	2,683
Rural West	731	0	0	0	731
Southeast	1,223	1,245	486	0	2,954
TOTAL	3,519	1,764	1,742	0	7,025
PERCENT	50%	25%	25%	0%	100%
As of 09/30/00	2,870	1,165	1,305	0	5,340

Chart 10
Subdivisions in Process - New Unit Potential
9/30/01

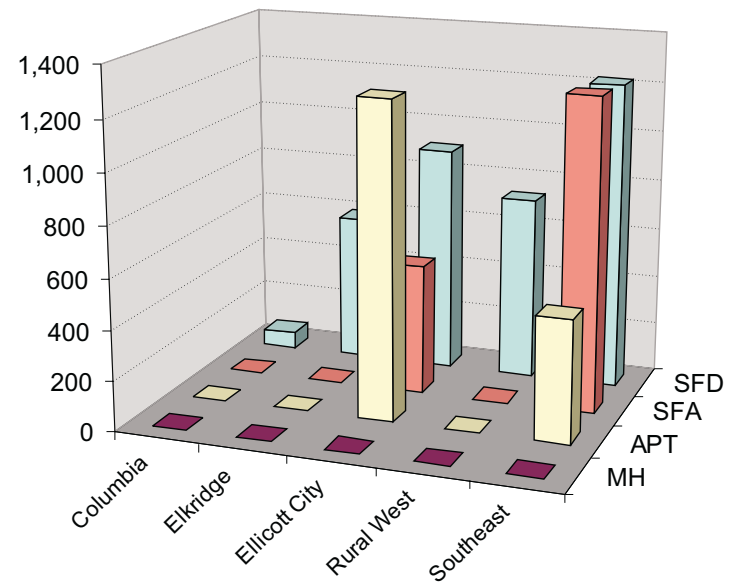


Table 8
Potential Units from Phased Projects

Planning Area	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	TOTAL
Columbia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Elkridge	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Ellicott City	171	89	181	153	376	47	601	60	103	193	0	0	0	0	0	1,803
Southeast	240	120	204	120	332	294	290	240	105	150	100	75	75	45	41	1,955
Rural West	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	411	209	385	273	708	341	891	300	208	343	100	75	75	45	41	3,758

Table 9
Number of Potential Units from Subdivision Plans in Process by Unit Type, 09/30/01

Planning Area	Sketch					Preliminary Equivalent Sketch				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Columbia	21	0	0	0	21	9	0	0	0	9
Elkridge	238	0	0	0	238	7	0	0	0	7
Ellicott City	453	396	963	0	1,812	167	0	0	0	167
Rural West	448	0	0	0	448	4	0	0	0	4
Southeast	809	601	486	0	1,896	9	86	0	0	95
TOTAL	1,969	997	1,449	0	4,415	196	86	0	0	282

Planning Area	Preliminary					Final				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Columbia	10	0	0	0	10	26	0	0	0	26
Elkridge	229	0	0	0	229	117	0	0	0	117
Ellicott City	32	116	293	0	441	256	7	0	0	263
Rural West	86	0	0	0	86	193	0	0	0	193
Southeast	69	157	0	0	226	336	401	0	0	737
TOTAL	426	273	293	0	992	928	408	0	0	1,336

TOTAL - 09/30/01				
SFD	SFA	APT	MH	TOTAL
66	0	0	0	66
591	0	0	0	591
908	519	1,256	0	2,683
731	0	0	0	731
1,223	1,245	486	0	2,954
3,519	1,764	1,742	0	7,025

Number of Acres

As of September 30, 2001 a total of 5,535 acres of residential land in were in the subdivision process. This is about 1,000 acres more than the previous year, at which time there were 4,587 acres in process (Table 10).

The most acreage in process was in the sketch plan phase (2,971 acres). The final plan stage had 1,785 acres in process and the preliminary plan stage had 686 acres in process. There were also 93 acres at the preliminary equivalent sketch plan stage.

Major Projects

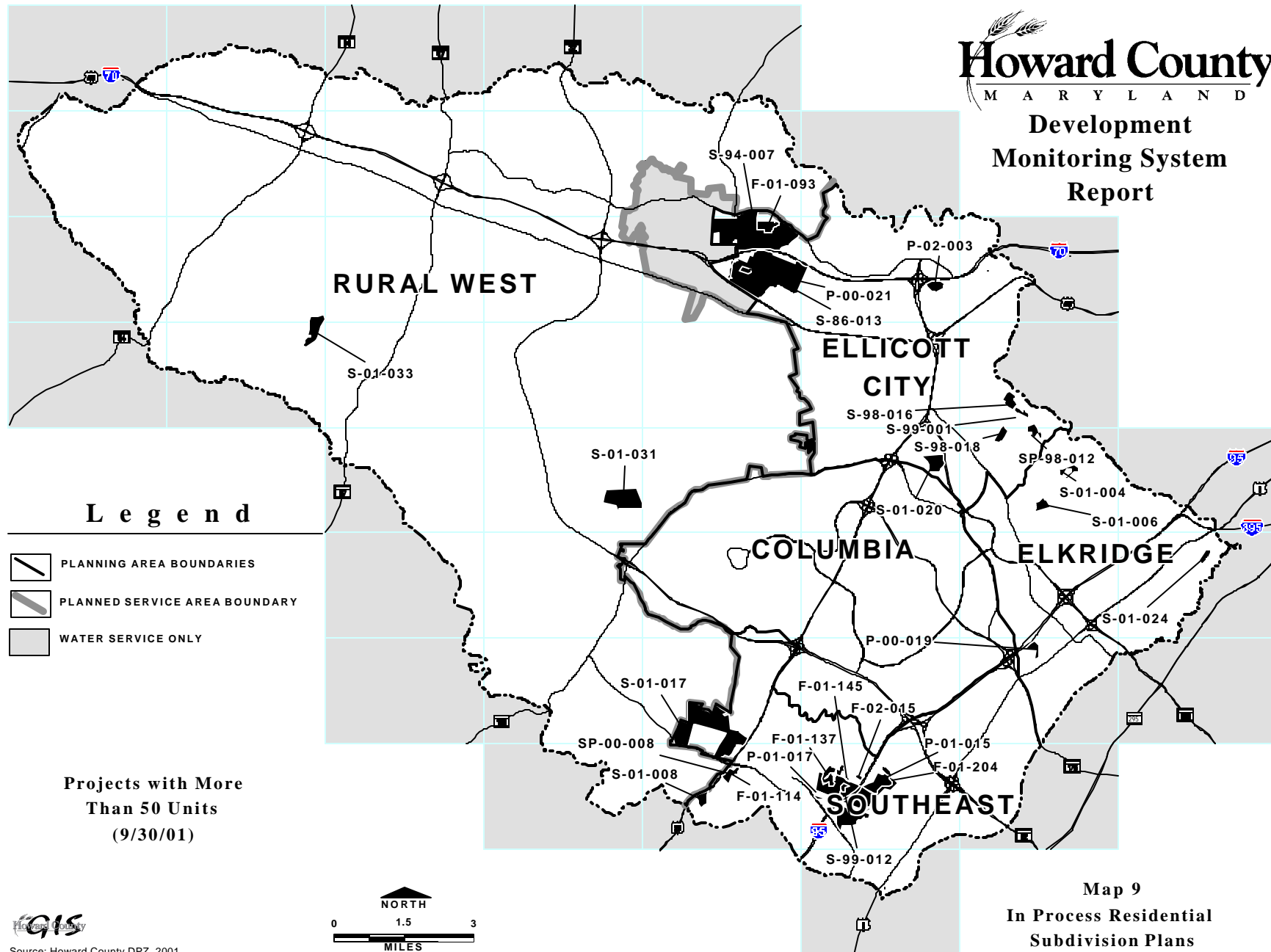
Table 11 shows a list of potential units from larger projects with 50 units or more. This list includes comprehensive or phased projects. Map 9 shows the location of these projects. Some of the larger projects in this list include the Key Property (or Emerson), Maple Lawn Farms, Turf Valley and Mount Joy Farm.

Table 10
Acreage of Residential Subdivision Plans in Process, 09/30/01
(With comparisons to Countywide total as of 09/30/00)

Planning Area	Preliminary Equivalent				TOTAL ACRES
	Sketch	Sketch	Preliminary	Final	
Columbia	15	7	13	13	48
Elkridge	122	2	53	82	259
Ellicott City	991	67	176	370	1,604
Rural West	1,133	11	293	940	2,377
Southeast	710	6	151	380	1,247
TOTAL	2,971	93	686	1,785	5,535
As of 09/30/00	1,877	108	935	1,667	4,587

Table 11
In-Process Residential Subdivision Plans, Projects With More Than 50 Units, 09/30/01

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Elkridge	P-00-019	The Oaks at Waters Edge	SFD	192	176
	S-01-004	Cascade Overlook	SFD	70	
	S-01-006	Dennis Preserve	SFD	53	
	S-01-024	Kuhn Property	SFD	53	
Ellicott City	S-86-013	Turf Valley	Residential	862	2,257
	S-01-020	Mount Joy Farm	APT,SFA,SFD	468	
	P-02-003	The Enclave at Ellicott Hills	Elderly Housing	284	
	S-94-007	Waverly	SFD,SFA,APT	157	
	P-00-021	Oakmont at Turf Valley	APT	125	
	S-98-018	Worthington Fields	SFD	99	
	S-98-016	Autumn River	SFD,SFA	95	
	S-99-001	Autumn View	SFD,SFA	60	
	SP-98-012	Autumn View	SFD	56	
	F-01-093	GTW's Waverly Woods	SFD	51	
Rural West	S-01-031	Walnut Grove	SFD	93	147
	S-01-033	Waterford Farms	SFD	54	
Southeast	S-01-017	Maple Lawn Farms	SFD,SFA,APT	1,116	2,725
	S-99-012	Emerson	SFD,SFA,APT	665	
	F-01-137	Emerson	SFD,SFA	240	
	P-01-017	Emerson	SFA	120	
	F-01-145	Emerson	SFA	120	
	P-01-015	Stone Lake (Oak Hill)	SFD,SFA	106	
	F-01-114	Cherrytree Park	SFD, SFA	84	
	SP-00-008	Cherrytree Park	SFA	86	
	F-01-204	Stone Lake (Oak Hill)	SFD	70	
	S-01-008	Jamestown Landing	SFD	64	
	F-02-015	Emerson	SFA	54	
TOTAL					5,305



Approved Residential Site Development Plans

The site development plan (SDP) process is usually the next development stage after lots are recorded. Once an SDP is approved, building permits can be issued after which actual land development can begin. Residential SDPs are required for all residential lots 20,000 square feet or less. This threshold is slightly less than a half acre. (Note that this has changed with recent amendments to the Subdivision regulations becoming effective January 8, 2002. The new regulations require site development plans for *all lots in the East*.) Many lots, especially in the West, are larger than 20,000 square feet. Consequently, SDPs do not account for all residential growth in the County.

Similar to subdivision activity, site development plan activity has been compiled by the five planning areas. The number of residential site development *plans* approved, the number of non-residential *lots* approved, and the *acreage* of approved plans have been compiled for each of these areas and are discussed below. The analysis includes last year's site development plan activity as well as activity for the last five years.

Summary of Last Year's Results

Last year there were 959 housing units approved in 61 site development plans totaling about 178 acres (Table 12). Ellicott City had the most units approved with 419, or 44 percent of the total. Columbia had 38 percent of the total with 368 approved units, followed by Elkridge with 127 approved units and the Southeast with 45 approved units. The Rural West had no units approved given the larger lot sizes which do not require site development plans.

Of the total 61 site development plans approved last year, 24 were in Ellicott City, followed by 21 in Columbia and 11 in Elkridge. The remaining 5 plans were in the Southeast.

Of the total 178 residential acres approved through site development plans, 77 acres, or 43 percent, were in Ellicott City. A total of 56 acres were approved in Columbia, followed by 27 acres approved in Elkridge and 18 acres approved in the Southeast.

Table 13 shows new units from approved site development plans by unit type. Of the 959 approved units, 488 were for single family detached units, 380 were for single family attached or townhouse units, and the remaining 91 were for apartment units. This represents 51 percent, 40 percent, and 9 percent of the total units, respectively. There were no mobile homes approved in site development plans last year. Chart 11 shows these results graphically.

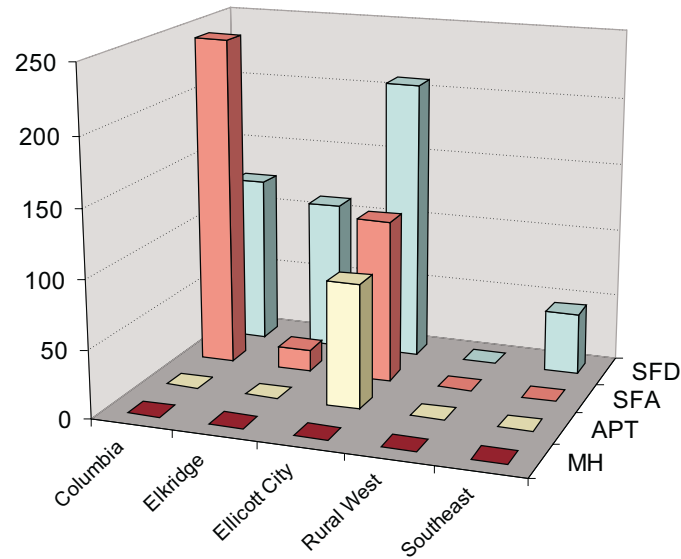
Table 12
Approved Residential Site Development Plans, 10/01/00 to 9/30/01

Planning Area	Units		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	368	38%	21	34%	56	31%
Elkridge	127	13%	11	18%	27	15%
Ellicott City	419	44%	24	39%	77	43%
Rural West	0	0%	0	0%	0	0%
Southeast	45	5%	5	8%	18	10%
TOTAL	959	100%	61	100%	178	100%

Table 13
Approved Units from SDP's by Unit Type, 10/01/00 to 9/30/01

Planning Area	SFD	SFA	APT	MH	TOTAL PERCENT	
Columbia	124	244	0	0	368	38.4%
Elkridge	111	16	0	0	127	13.2%
Ellicott City	208	120	91	0	419	43.7%
Rural West	0	0	0	0	0	0.0%
Southeast	45	0	0	0	45	4.7%
TOTAL	488	380	91	0	959	100.0%
PERCENT	51%	40%	9%	0%	100%	

Chart 11
Units in Approved Site Development Plans
10/1/00 to 9/30/01



Last Year's Projects - Greater than 30 Units

Of the total 959 units approved in site development plans last year, 684 or about 71 percent were in site development plans consisting of more than 30 units. These larger projects, shown in Table 14, are located in three of the five areas – Columbia, Elkridge and Ellicott City. The location of these plans are shown on Map 10.

Of the 300 units approved in Columbia last year, 127 of them were SFA units in Town Center, 117 were SFA units in River Hill, and the remaining 56 were SFD units in Eckers Hollow. In Elkridge, 51 units were approved as part of New Colony Village. In Ellicott City, 333 units were part of larger site development plans. These include SFA units in Waverly Woods, SFD units in Hollifield Estates and Treyburn, and elderly apartments as part of the expansion of Park View at Ellicott City.

Five Year Results

Table 15 shows the approved residential site development plans for the last five years from October 1, 1996 to September 30, 2001. Over this five year period 7,246 units were approved countywide in 345 site development plans totaling about 1,444 acres. This equates to a five year average of

Table 14
Approved Residential SDP's, Projects With More Than 30 Units, 10/01/00 to 9/30/01

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	SDP-01-031	Town Center	SFA	127	300
	SDP-01-012	Village of River Hill	SFA	61	
	SDP-00-137	Village of River Hill	SFA	56	
	SDP-01-016	Eckers Hollow	SFD	56	
Elkridge	SDP-00-070	New Colony Village	SFD	51	51
Ellicott City	SDP-01-050	Park View At Ellicott City	APT Elderly Housing	91	333
	SDP-01-070	Treyburn	SFD	44	
	SDP-01-096	GTW's Waverly Woods	SFA	41	
	SDP-01-101	GTW's Waverly Woods	SFA	40	
	SDP-01-099	GTW's Waverly Woods	SFA	39	
	SDP-00-080	Hollifield Estates	SFD	39	
	SDP-00-130	Hollifield Estates	SFD	39	
TOTAL					684

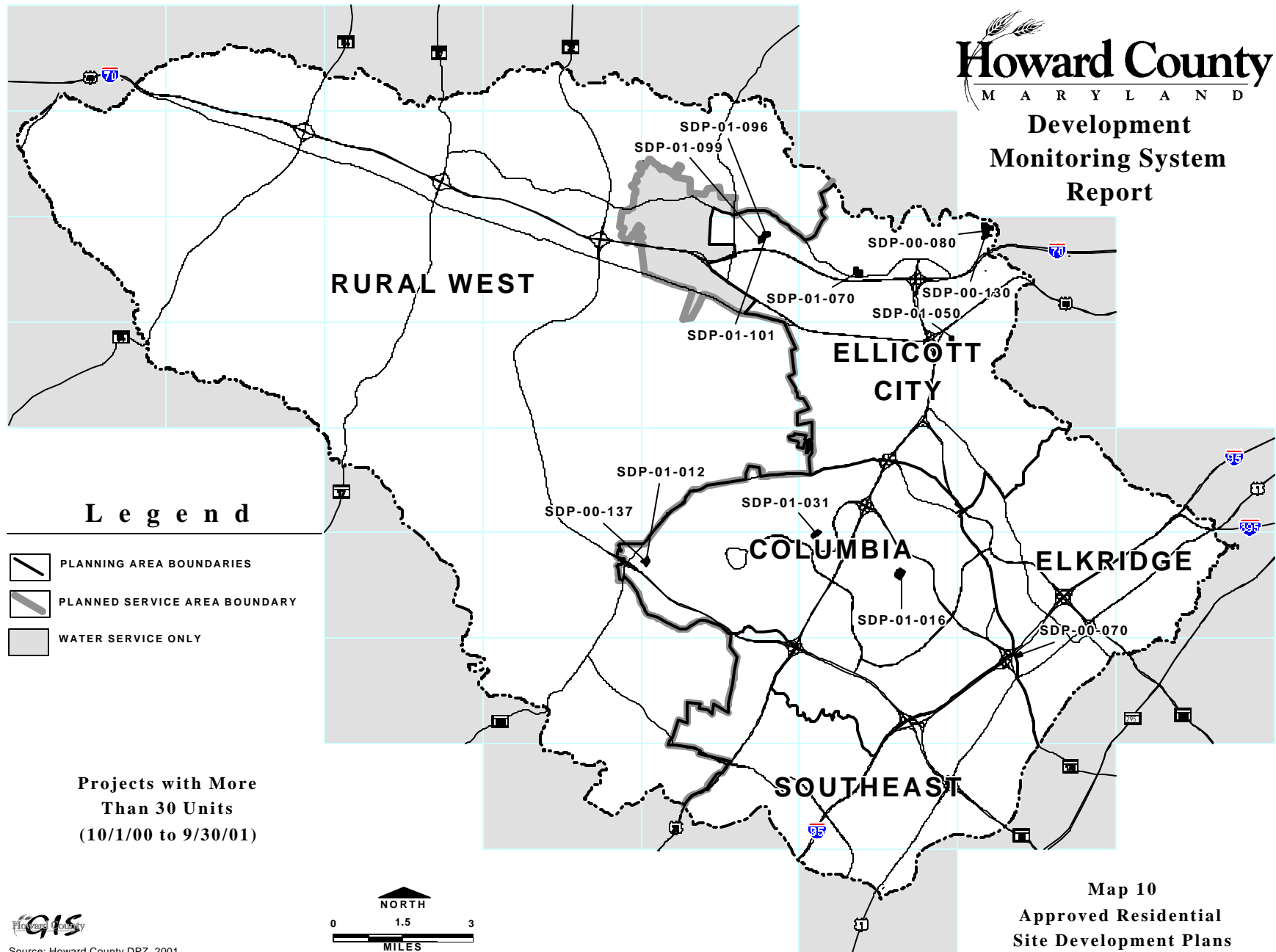


Table 15
Approved Residential Site Development Plans, 10/01/96 to 9/30/01

Year	Units	Plans	Acreage
10/96 to 9/97	1,874	71	430
10/97 to 9/98	1,076	68	235
10/98 to 9/99	1,772	89	368
10/99 to 9/00	1,565	56	233
10/00 to 9/01	959	61	178
TOTAL	7,246	345	1,444
5 YEAR AVG.	1,449	69	289

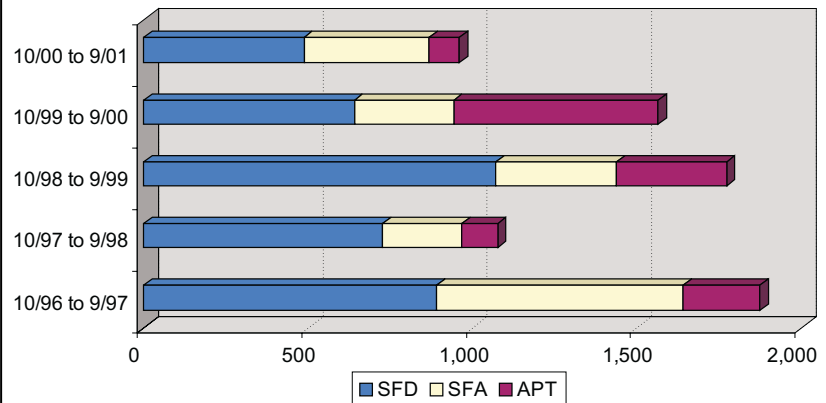
1,449 units per year. With only 959 approved units, last year had the smallest number of approved units of all five years, substantially less than the 1,449 five year average.

Table 16 shows the approved units by unit type for each of the last five years. Over the five year period, 53 percent of the units were single family detached, 28 percent were single family attached and 19 percent were apartments. The five year totals are 3,318, 2,041 and 1,387 for single family detached, single family attached and apartment units, respectively. Chart 12 shows these results graphically.

Table 16
Approved Units in Residential Site Development Plans, 10/01/96 to 9/30/01

Year	SFD	SFA	APT	MH	Total
10/96 to 9/97	890	751	233	0	1,874
10/97 to 9/98	727	241	108	0	1,076
10/98 to 9/99	1,072	367	333	0	1,772
10/99 to 9/00	641	302	622	0	1,565
10/00 to 9/01	488	380	91	0	959
TOTAL	3,818	2,041	1,387	0	7,246
PERCENT	53%	28%	19%	0%	100%
5 YEAR AVG.	764	408	277	0	1,449

Chart 12
Housing Units in Approved SDP's, 10/1/96 to 9/30/01



In Process Residential Site Development Plans

This section summarizes residential site development plans in process. The number of *plans*, potential *units* and *acreage* currently being processed as of September 30, 2001 are tabulated and compared to those in process a year earlier (as of September 30, 2000). Note that since the five planning areas are new this year do not compare to the six regions used in the past, detailed comparisons by area are not included. Refer to past year DMS reports for location specifics.

As indicated earlier, large residential lots 20,000 square feet or larger do not require site development plans. Therefore, the tables shown in this section do not include most units proposed in the West.

Number of Plans

About the same number of residential site development plans were in process as of September 30, 2000 compared to one year earlier, 30 plans compared to 27 plans (Table 17).

As of September 30, 2001, Ellicott City had 13 plans in process, followed by Elkrigde with 6, the Southeast with 5 and Columbia with 4. There were only two plans in process in the Rural West – both for the Villas at Cattail Creek, two senior housing options under consideration that would be permitted as a conditional use.

Table 17
Number of Residential SDP's In Process, 09/30/00 & 09/30/01

Planning Area	2001	2000 (1)
Columbia	4	
Elkrigde	6	
Ellicott City	13	
Rural West	2	
Southeast	5	
TOTAL	30	27

(1) Only total is shown given new planning areas do not compare to past years.

Number of Potential Units

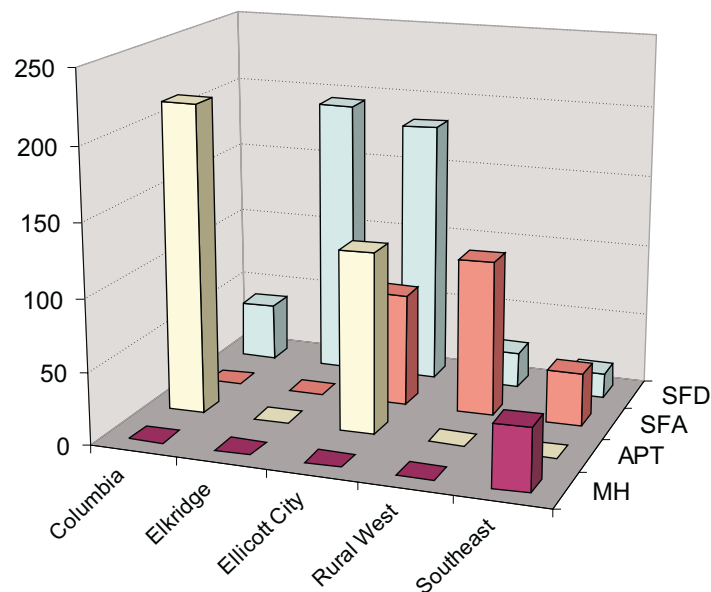
There were slightly more potential units in process as of September 30, 2000 compared to a year earlier, 1,065 units compared to 1,028 units (Table 18). Ellicott City had the largest number of units in process in 2001 with 386, 36 percent of the countywide total. This is followed by Columbia and Elkrigde with 255 (24 percent) and 194 (18 percent) units in process, respectively. The Rural West had 133 units in process as of September 30, 2001 followed by 97 units in the Southeast.

Table 18
Number of Potential Units from Site Development Plans in Process, 09/30/01
(With comparisons to Countywide total as of 09/30/00)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Columbia	40	0	215	0	255
Elkrigde	194	0	0	0	194
Ellicott City	183	78	125	0	386
Rural West	25	108	0	0	133
Southeast	17	37	0	43	97
TOTAL	459	223	340	43	1,065
As of 09/30/00	471	368	189	0	1,028

As indicated in Table 18, the greatest number of units in process are for single family detached with 459 proposed units in 2001. This is followed by 340 proposed apartment units. There were 223 proposed single family attached or townhouse units and 43 mobile homes. Chart 13 graphically illustrates the units in process by unit type for the current year. (As indicated earlier, large residential lots 20,000 square feet or larger do not require site development plans. Therefore, the table and chart would not include most units proposed in the West.)

Chart 13
SDP's in Process - New Unit Potential
9/30/01



Number of Acres

As of September 30, 2001 a total of 216 acres of residential land were in the site development plan process. This is 22 acres more than the previous year, at which time there were 194 acres in process (Table 19).

The greatest amount of in process acreage was in the Rural West, with 78 acres. There were 58 acres in process in Ellicott City, 36 acres in Elkrige, 24 acres in Columbia and 20 acres in the Southeast.

Major Projects

Table 20 shows a list of potential units from larger projects with 30 units or more. Map 11 shows the location of these projects. Of the 1,065 units in the site development plan process, 798 or about 75 percent were in projects with 30 units or more.

Table 19
Acreage of Residential SDP's In Process, 09/30/01

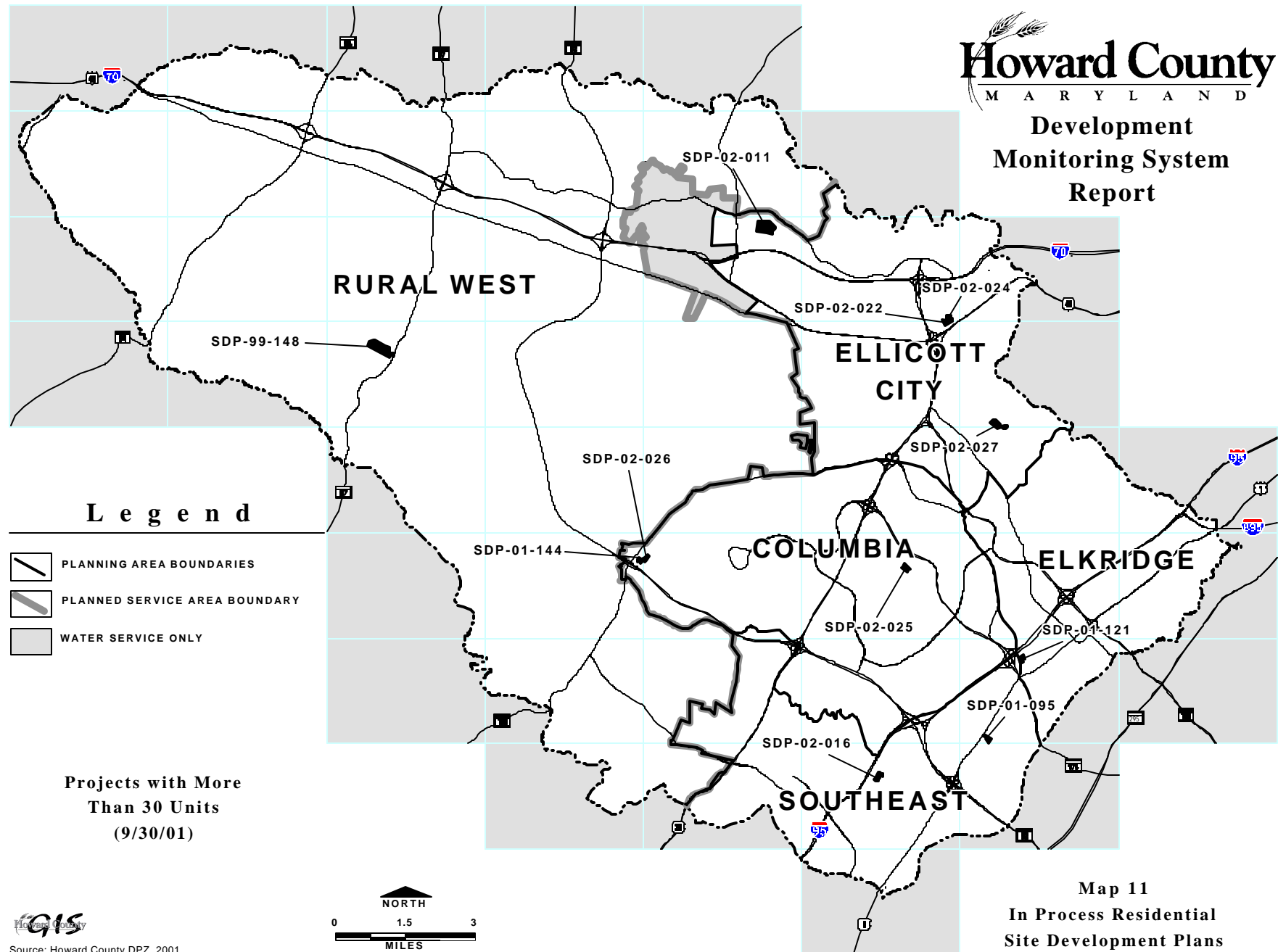
Planning Area	2001	2000 (1)
Columbia	24	
Elkrige	36	
Ellicott City	58	
Rural West	78	
Southeast	20	
TOTAL	216	194

(1) Only total is shown given new planning areas do not compare to past years.

Ellicott City had 251 units in process as part of larger projects, followed by Columbia with 248, Elkrige with 111, the Rural West with 108 and the Southeast with 80. Larger projects in Ellicott City include apartments and townhouses in Kaiser Farm and single family detached units as part of the Worthington Fields and Waverly Woods subdivisions. Larger projects in Columbia include apartments in River Hill and single family detached units as part of Eckers Hollow. The larger project in Elkrige is for manufactured homes in New Colony Village. Large projects in the Southeast include mobile homes in Brentwood Manor and SFA units in the Stone Lake subdivision. There are also 108 SFA units in process for the Villas at Cattail Creek.

Table 20
In Process Residential Site Development Plans, Projects With More Than 30 Units, 9/30/01

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	SDP-01-144	Village of River Hill	APT	108	
	SDP-02-026	Village of River Hill	APT	107	
	SDP-02-025	Eckers Hollow	SFD	33	248
Elkridge	SDP-01-121	New Colony Village	SFD	111	111
Ellicott City	SDP-02-024	Kaiser Farm	APT	98	
	SDP-02-022	Kaiser Farm	SFA	78	
	SDP-02-027	Worthington Fields	SFD	42	
	SDP-02-011	Waverly Woods	SFD	33	251
Southeast	SDP-01-095	Brentwood Manor Expansion	MH	43	
	SDP-02-016	Stone Lake	SFA	37	80
Rural West	SDP-99-148	The Villas at Cattail Creek	SFA	108	108
TOTAL					798



Residential Building Permits & Use and Occupancy Permits

The final stage of the development process is the issuance of building permits. In Howard County, building permits are required for all construction. This section of the report tabulates building permits for all new residential construction. Once construction is complete and prior to residents moving in, use and occupancy permits are required. These are also tabulated and discussed further below. Both building permits and use and occupancy permits have been compiled by the five planning areas.

Issued Building Permits

Summary of Last Year's Results

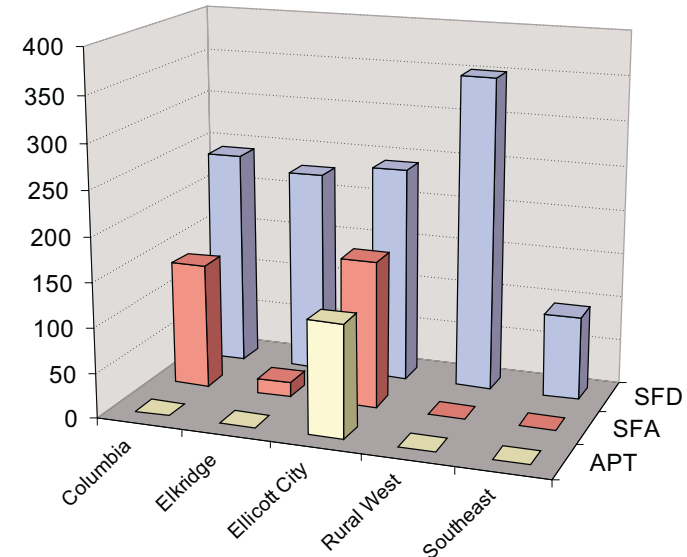
Last year from October 1, 2000 to September 30, 2001, the County issued 1,604 residential building permits for new construction (Table 21). Of all planning areas, Ellicott City had the most building permits issued with 532, 33 percent of the total. Columbia had 382 issued permits (24%) and the Rural West had 352 issued permits (22%). There were 244 issued permits in Elkridge (15%) and 94 in the Southeast (6%).

Countywide, 72 percent of the permits were for single family units. About 20 percent were for SFA units and 8% for apartment units, the greatest number of which were in the Rural West. No permits for mobile homes were issued last year. Chart 14 shows these results graphically by planning area.

Table 21
Issued Residential Building Permits by Unit Type, 10/01/00 to 9/30/01

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	242	140	0	0	382	24%
Elkridge	228	16	0	0	244	15%
Ellicott City	242	164	126	0	532	33%
Rural West	352	0	0	0	352	22%
Southeast	94	0	0	0	94	6%
TOTAL	1,158	320	126	0	1,604	100%
PERCENT	72%	20%	8%	0%	100%	

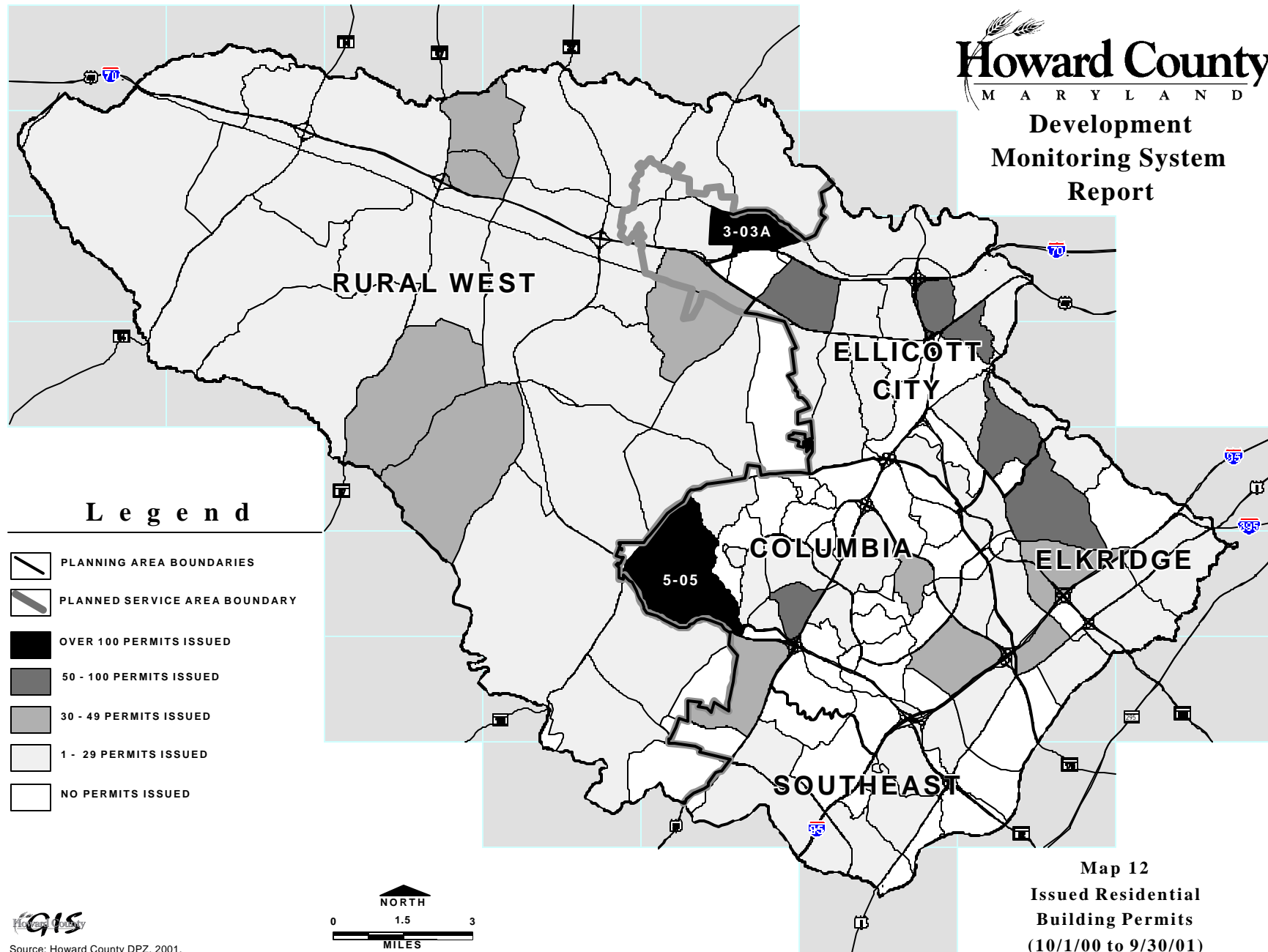
Chart 14
Issued Building Permits by Unit Type
10/1/00 to 9/30/01



Map 12 shows the building permit activity by statistical area of the County. Statistical areas 5-05 and 3-03A each had more than 100 permits issued. These are the areas containing River Hill and Waverly Woods. Of these two areas, statistical area 5-05 had the greatest number with 240 issued permits. Statistical area 3-03A had 133 issued permits. The map indicates the activity in the remaining statistical areas for various ranges.

Last Year's Projects - Greater Than 30 Units

Table 22 summarizes the issued residential building permits in larger subdivisions with more than 30 units. About 52 percent, or 836 of the total 1,604 permits issued last year, fall into this category. Map 13 shows the locations of each of the subdivisions.



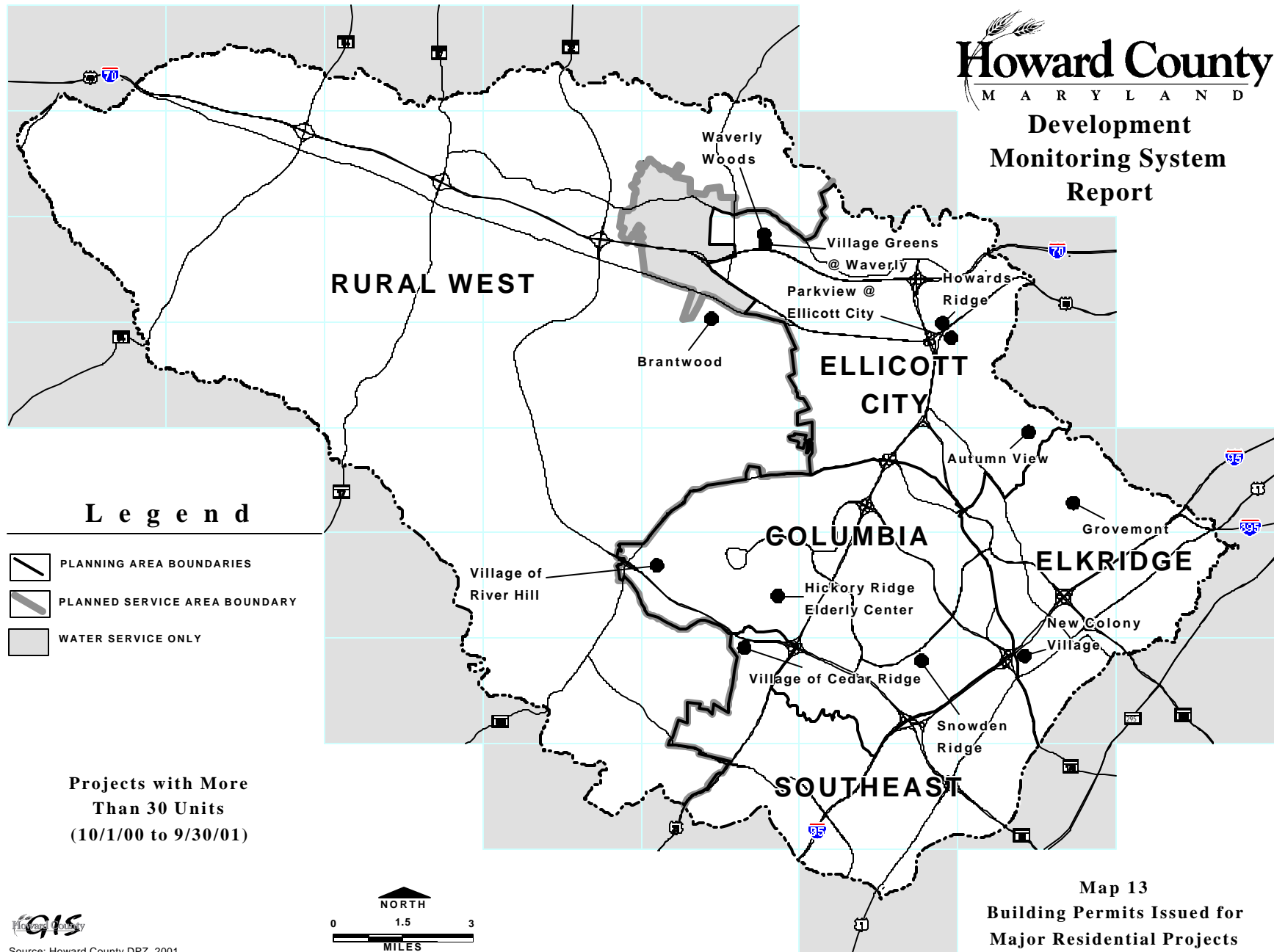


Table 22
Issued Residential Building Permits in
Subdivisions With More Than 30 Units, 10/01/00 to 9/30/01

Subdivision	Region	Type	Units	TOTAL
Parkview at Ellicott City	Ellicott City	APT	91	126
Village Greens at Waverly	Ellicott City	APT	35	
Waverly Woods	Ellicott City	SFA	76	
Howards Ridge	Ellicott City	SFA	69	
Hickory Ridge Elderly Center	Columbia	SFA	46	
Snowden Ridge	Columbia	SFA	36	227
Village of River Hill	Columbia	SFD	222	
Grovemont	Elkridge	SFD	77	
Autumn View	Ellicott City	SFD	67	
New Colony Village	Elkridge	SFD	49	
Village of Cedar Ridge	Southeast	SFD	35	483
Brantwood	Rural West	SFD	33	
TOTAL				836

Five Year Results

Over five years, from October 1, 1996 to September 30, 2001, a total of 10,652 residential building permits have been issued in Howard County (Table 23). This is an average of about 2,130 permits per year. The five year trends indicate an increase in the number of issued permits each year from 2,065 in 96/97 to a high of 2,418 in 99/00 before a significant drop last year with only 1,604 issued permits. This is a 34 percent decrease (814

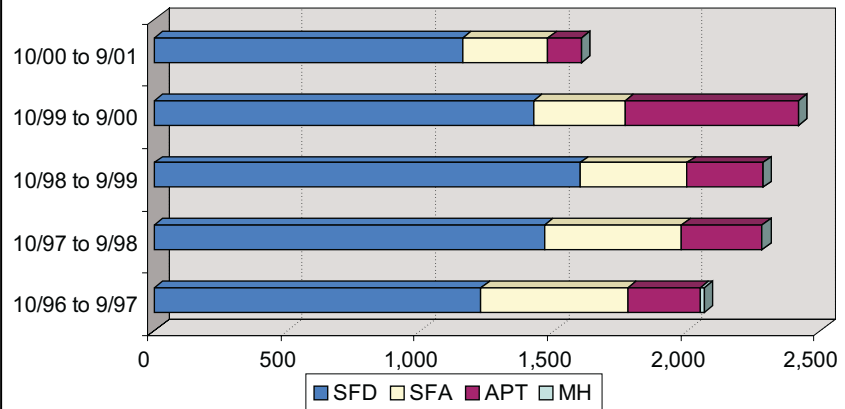
Table 23
Issued Residential Building Permits by Unit Type, 10/01/96 to 9/30/01

Year	SFD	SFA	APT	MH	Total
10/96 to 9/97	1,227	549	274	15	2,065
10/97 to 9/98	1,465	515	301	0	2,281
10/98 to 9/99	1,600	400	284	0	2,284
10/99 to 9/00	1,425	342	651	0	2,418
10/00 to 9/01	1,158	320	126	0	1,604
TOTAL	6,875	2,126	1,636	15	10,652
PERCENT	65%	20%	15%	0%	100%
5 YEAR AVE.	1,375	425	327	3	2,130

permits).

Of the 10,652 total permits issued over five years, 6,875, or 65 percent, were for single family detached units. There were 2,126 permits (20 percent) for single family attached units, 1,636 permits (15 percent) for apartment units and 15 permits for mobile homes. Chart 15 shows the results by unit type graphically over time.

Chart 15
Issued Building Permits by Unit Type
10/1/96 to 9/30/01



Use and Occupancy Permits

Summary of Last Year's Results

Last year from October 1, 2000 to September 30, 2001, the County issued 1,904 use and occupancy permits (Table 24). Of all planning areas, Ellicott City had the most with 634, 33 percent of the total. This is followed by Columbia with 498 issued use and occupancy permits. The Rural West had 393 issued permits, followed by Elkridge and the Southeast with 241 and 138 issued permits, respectively. Chart 16 shows these results graphically.

Table 24
Issued Use and Occupancy Permits by Unit Type, 10/01/00 to 9/30/01

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	313	85	100	0	498	26%
Elkridge	240	1	0	0	241	13%
Ellicott City	271	284	79	0	634	33%
Rural West	393	0	0	0	393	21%
Southeast	129	9	0	0	138	7%
TOTAL	1,346	379	179	0	1,904	100%
PERCENT	71%	20%	9%	0%	100%	

Countywide, 71 percent of the permits were for single family units. About 20 percent were for single family attached units and 9 percent were for apartment units. No permits for mobile homes were issued last year.

Five Year Results

Over five years, from October 1, 1996 to September 30, 2001, a total of 10,062 use and occupancy permits have been issued in Howard County (Table 25). This is an average of about 2,012 permits per year.

Of the 10,062 total permits issued over five years, 6,713, or 67 percent, were for single family detached units. There were 2,232 permits (22 percent) for single family attached units, 1,099 permits (11 percent) for apartment units and 18 permits for mobile homes. Chart 17 shows the results by unit type graphically over time.

The number of issued permits increased each year from 1996 until last year when they dropped to 1,904 from a high of 2,494 the year before. This drop occurred for all unit types – single family detached, single family attached and apartment units.

Chart 16
Issued Use & Occup. Permits by Unit Type
10/1/00 to 9/30/01

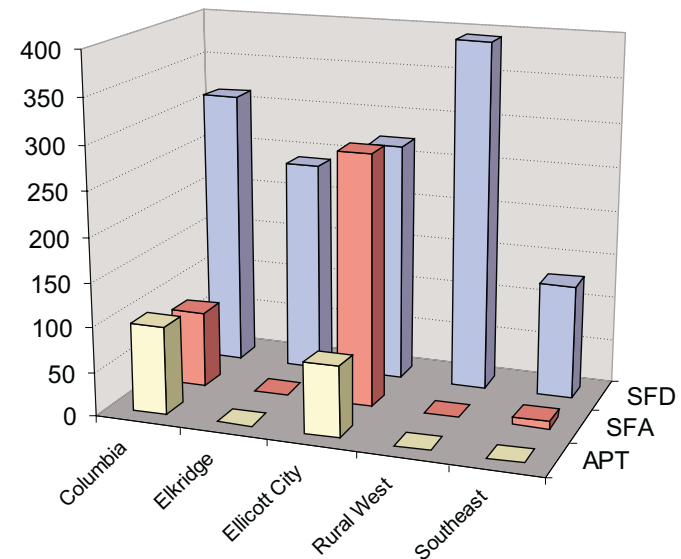
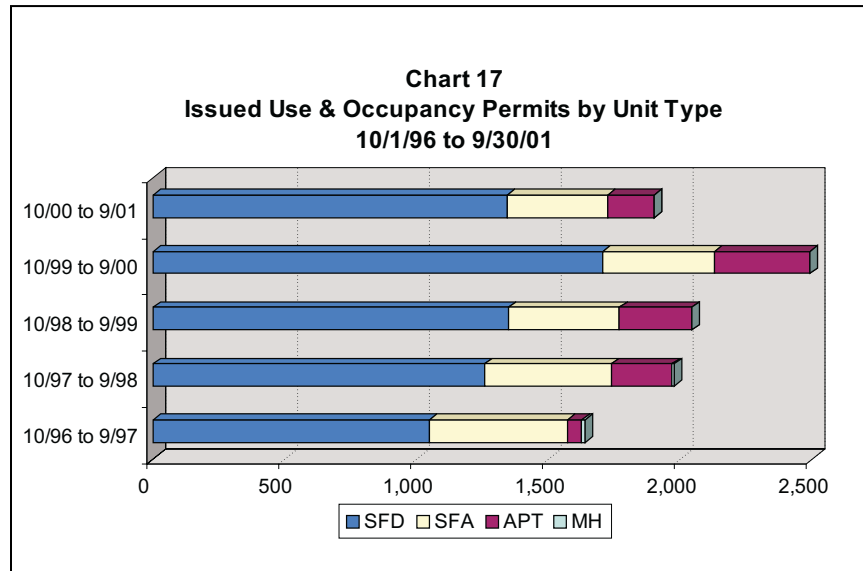


Table 25
Issued Use and Occupancy Permits by Unit Type, 10/01/96 to 9/30/01

Year	SFD	SFA	APT	MH	Total
10/96 to 9/97	1,051	522	56	11	1,640
10/97 to 9/98	1,258	484	230	7	1,979
10/98 to 9/99	1,350	422	273	0	2,045
10/99 to 9/00	1,708	425	361	0	2,494
10/00 to 9/01	1,346	379	179	0	1,904
TOTAL	6,713	2,232	1,099	18	10,062
PERCENT	67%	22%	11%	0%	100%
5 YEAR AVE.	1,343	446	220	4	2,012



Housing Unit Allocations

Subdivision applications submitted after April 10, 1992 are subject to the Adequate Public Facilities Ordinance (APFO) and may require housing unit allocations. The typical time period between initial subdivision submission and occupancy is three years. Consequently, plan approvals in the FY2000 are granted allocations for the 2003 allocation year. Some submissions contain phasing over several years and are granted allocations for future years, if available. The number of allocations available is established annually by County Council resolution. The allocation chart is based on the General Plan growth projections by planning area. Depending upon zoning and plan type, *tentative allocations* are usually assigned upon sketch plan approval. Allocations become *permanent* upon final plat recordation.

In accordance with APFO, since the 1997 allocation year (1994 plan submission year), the allocations have been adjusted to reflect regional development activity using a “rolling average.” The intent of the rolling average is to provide a means to annually adjust the allocation chart to achieve the overall General Plan targets. The rolling average formula uses: 1) the number of allocations granted, 2) the number of lots recorded in projects that were exempt from APFO, and 3) the General Plan target.

Table 26 is the current allocation chart, which the County Council adopted November 5, 2001. Total allocations are shown by the five planning areas.

As indicated earlier, these five planning areas are new. The six school regions are no longer used. These new planning areas are consistent with General Plan projections and the amended Adequate Public Facilities Ordinance. Refer to the maps shown earlier in this report for an outline of the areas. From the November 5, 2001 chart adoption until the next chart adoption (planned for July 2002), the Department of Planning and Zoning may assign year 2004 allocations.

As allowed under APFO, to provide some flexibility, up to 20 percent more allocations than available can be granted in each planning area for the 2004 allocation year. If this is utilized and more allocations are granted than available for the current allocation year, then available allocations in future years are reduced based on the rolling average. Consequently, areas with strong demand show a decrease in available allocations over time. On the other hand, for areas that do not have strong demand available allocations increase over time.

As of November 14, 2001, 993 allocations had been granted for the 2004 Allocation Year (Table 27). In the ElkrIDGE planning area all available allocations have been granted including the extra 20 percent. All additional projects in ElkrIDGE are therefore placed in the waiting bin. As of November 14, all the other regions still have available capacity, although Ellicott City and the Southeast are near to being closed.

Table 26
Housing Unit Allocation Chart, Adopted November 5, 2001

Planning Area	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Columbia	499	498	332	220	220	220	220	158	158	158
ElkrIDGE	83	84	113	130	130	130	130	164	164	164
Ellicott City	259	259	348	348	348	348	348	358	358	358
Southeast	198	198	246	302	302	302	302	320	320	320
Rural West	244	244	244	250	250	250	250	250	250	250
Senior East	249	249	249	250	250	250	250	250	250	250
TOTAL	1,532	1,532	1,532	1,500	1,500	1,500	1,500	1,500	1,500	1,500

Comprehensive and phased subdivisions may request and receive allocations for future years. As of November 14, 2001 a total of 2,310 allocations have been granted for future years (Table 28). These future year allocations have been given to the following subdivisions: the Kuhn Property in Elkridge; Autumn View, Autumn River, Mount Joy Farm, Worthington Fields and Waverly in the Ellicott City; Cherry Tree Park, the Key Property (Emerson) and Maple Lawn Farms in the Southeast; and Walnut Grove in the Rural West.

Table 27
Housing Unit Allocations, 2004 Allocation Year

Planning Area	Possible Allocations		Allocations Granted ¹	Remaining Available
	2004	+ 20%		
Columbia	499	599	13	586
Elkridge	83	100	100	0
Ellicott City	259	311	300	11
Southeast	198	238	227	11
Rural West	244	293	181	112
Senior East	249	299	172	127
TOTAL	1,532	1,840	993	847

1. As of November 14, 2001

Table 28
Granted Allocations for Future Years¹

Planning Area	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	TOTAL
Columbia	0	0	0	0	0	0	0	0	0	0	0	0
Elkridge	2	0	0	0	0	0	0	0	0	0	0	2
Ellicott City	135	47	60	60	103	113	0	0	0	0	0	518
Southeast	332	294	290	240	105	150	100	75	75	45	41	1,747
Rural West	43	0	0	0	0	0	0	0	0	0	0	43
Senior East	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	512	341	350	300	208	263	100	75	75	45	41	2,310

1. As of November 14, 2001

Potential Population

Table 29 shows the household size estimates used for the recently adopted General Plan 2000. They are also used for purposes of this analysis. The values have been estimated based on 1990 Census data. Although initial 2000 Census data have been released, this initial dataset does not contain information on household size by unit type, which is not expected to be released by the Census Bureau until sometime between the summer and fall of 2002. The initial Census data release, however, indicate that there is no difference in the *overall countywide* household size value in 1990 and 2000. Both are 2.71. The owner occupied household size is also the same for both years at 2.89. The renter occupied household size has decreased slightly from 2.26 in 1990 to 2.22 in 2000. It is fair to say, therefore, that the 1990 estimate for household size is more than likely a relatively good representation of current conditions.

Table 29
Household Size by Dwelling Unit Type

Year	SFD	SFA	APT	MH
2000 General Plan	3.13	2.58	1.87	2.40

The development pipeline can be analyzed to project expected population growth from new development. As development progresses throughout the process, more exact population estimates based on dwelling unit type are possible. For this report, annual population growth has been estimated from potential housing units at three development stages: 1) recorded subdivisions, 2) issued building permits, and 3) issued use and occupancy permits. Table 30 summarizes the estimated population results from new growth for last year as well as the five year average.

Based on recorded lots last year from October 1, 2000 to September 30, 2001, there is potential for 2,866 new residents. This compares to a potential population of 4,661 based on the number of issued building permits and an estimated population of 5,525 based on use and occupancy permits issued during the same one year time period.

Table 30
Comparison of Housing and Population Estimates

Category	10/00 to 9/01		10/96 to 9/01 (Annual Ave.)	
	Housing Units	Population	Housing Units	Population
Recorded Lots	990	2,866	1,419	4,007
Building Permits	1,596	4,661	2,129	6,015
U & O Permits	1,904	5,525	2,012	5,774

Over the five year period from October 1, 1996 to September 30, 2001, average annual population growth based on recorded lots is 4,007. Population growth based on the number of issued building permits and use and occupancy permits amounts to 6,015 and 5,774 per year, respectively. More detailed results for each development category are discussed in the sections below.

As indicated earlier in this report, not all potential units go through the subdivision process, so building permits and use & occupancy permits are a more accurate measure of population growth.

Population Estimates from Recorded Subdivisions

Table 31 shows the potential population from recorded lots by unit type and by region for the 10/00 to 9/01 one year time period. Of the 2,866 potential new residents 76 percent will reside in single family detached units, 18 percent in single family attached units and 6 percent in apartment units. About 48 percent will live in Ellicott City, 30 percent in the Rural West, and 10 percent in Columbia. The remaining 11 percent will live in Elkridge and the Southeast.

For the five years since October 1, 1996, there has been a potential of 7,094 residential units from recorded lots. This averages 1,419 new units per year. Using the household size estimates discussed above for each unit type, an estimated 20,033 new residents could live in those units (Table

32). This results in an average population growth rate of about 4,000 new residents per year. For the last two years, the potential population has been lower than this average, at 2,320 in 99/00 and 2,866 in 00/01.

Of the total 20,033 residents, 71 percent of the total population would reside in single family detached units. About 19 percent would live in single family attached units and 10 percent in apartment units.

Table 31
Potential Population from Recorded Lots, 10/01/00 to 9/30/01

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	297	0	0	0	297	10%
Elkridge	203	0	0	0	203	7%
Ellicott City	685	511	183	0	1,380	48%
Rural West	861	0	0	0	861	30%
Southeast	125	0	0	0	125	4%
TOTAL	2,172	511	183	0	2,866	100%
PERCENT	76%	18%	6%	0%	100%	

Table 32
Potential Population from Recorded Lots, 10/01/96 to 9/30/01

Year	SFD	SFA	APT	MH	Total
10/96 to 9/97	4,025	2,136	1,538	0	7,699
10/97 to 9/98	2,394	157	294	0	2,845
10/98 to 9/99	4,034	268	0	0	4,303
10/99 to 9/00	1,574	746	0	0	2,320
10/00 to 9/01	2,172	511	183	0	2,866
TOTAL	14,200	3,818	2,015	0	20,033
PERCENT	71%	19%	10%	0%	100%
5 YEAR AVE.	2,840	764	403	0	4,007

Population Estimates from Issued Building Permits

Building permits are generally a more timely and accurate indicator of potential population than recorded lots in subdivision plans. Population estimates in this section may differ from previous DMS reports due to canceled building permits and changes in permits issued after the reporting period.

Table 33 shows the potential population from building permits by type and by region for the 10/00 to 9/01 one year time period. Of the 4,661 new residents 77 percent would reside in single family detached units, 18 percent in single family attached units and 5 percent in apartment units. About 30 percent are located in Ellicott City, 24 percent each in Columbia and the Rural West, 16 percent in Elkridge and 6 percent in the Southeast.

Table 33
Potential Population from Building Permits, 10/01/00 to 9/30/01

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	757	361	0	0	1,119	24%
Elkridge	689	41	0	0	730	16%
Ellicott City	757	423	236	0	1,416	30%
Rural West	1,102	0	0	0	1,102	24%
Southeast	294	0	0	0	294	6%
TOTAL	3,599	826	236	0	4,661	100%
PERCENT	77%	18%	5%	0%	100%	

For the five years since October 1, 1996, 10,644 building permits for new residential units have been issued. This averages 2,129 permits per year. Using the household size estimates discussed earlier for each unit type, an estimated 30,074 new residents would live in those units (Tables 34).

Of the total 30,074 residents, 71 percent of the total population would reside in single family detached units. About 18 percent would live in single family attached units, 10 percent in apartments and less than 1 percent in mobile homes.

Table 34
Potential Population from Building Permits, 10/01/96 to 9/30/01

Year	SFD	SFA	APT	MH	Total
10/96 to 9/97	3,840	1,416	513	36	5,805
10/97 to 9/98	4,585	1,329	563	0	6,477
10/98 to 9/99	5,008	1,032	531	0	6,571
10/99 to 9/00	4,460	882	1,218	0	6,560
10/00 to 9/01	3,599	826	236	0	4,661
TOTAL	21,492	5,484	3,061	36	30,074
PERCENT	71%	18%	10%	0%	100%
5 YEAR AVE.	4,298	1,097	612	7	6,015

Population Estimated from Use and Occupancy Permits

Use and occupancy permits are the most accurate and immediate predictor of new population. A use and occupancy permit is issued upon completion of a residential unit and is required prior to residents moving in.

Table 35 shows the potential population from use and occupancy permits by type and by region for the 10/00 to 9/01 one year time period. Of the estimated 5,525 new residents 76 percent live in single family detached units, 18 percent in single family attached units and 6 percent in apartment units. About 31 percent live in the Ellicott City, 25 percent in Columbia, 22 percent in the Rural West and 8 percent in the Southeast.

For the five years since October 1, 1996, there have been 10,062 use and occupancy permits issued. This averages about 2,000 per year. Using the household size estimate discussed above, an estimated 28,868 new residents could live in those units (Table 36).

Of the total 28,868 new residents, about 73 percent of the total would reside in single family detached units. About 20 percent would live in single family attached units, 7 percent in apartments and less than 1 percent in mobile homes.

Table 35
Potential Population from Use & Occupancy Permits, 10/01/00 to 9/30/01

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	980	219	187	0	1,386	25%
Elkridge	751	3	0	0	754	14%
Ellicott City	848	733	148	0	1,729	31%
Rural West	1,230	0	0	0	1,230	22%
Southeast	404	23	0	0	427	8%
TOTAL	4,213	978	335	0	5,525	100%
PERCENT	76%	18%	6%	0%	100%	

Table 36
Potential Population from Use & Occupancy Permits, 10/01/96 to 9/30/01

Year	SFD	SFA	APT	MH	Total
10/96 to 9/97	3,289	1,347	105	26	4,767
10/97 to 9/98	3,937	1,249	430	17	5,633
10/98 to 9/99	4,225	1,089	511	0	5,825
10/99 to 9/00	5,346	1,096	675	0	7,118
10/00 to 9/01	4,213	978	335	0	5,525
TOTAL	21,010	5,758	2,056	43	28,868
PERCENT	72.8%	19.9%	7.1%	0.1%	100%
5 YEAR AVE.	4,202	1,152	411	9	5,774

Housing Sales

The Department of Planning and Zoning receives monthly updates of all recorded property transfers from the State. These reports are edited and used to create a database of housing sales. For this report, the most recent data from October 1, 2000 to September 30, 2001 have been analyzed and tabulated by unit type. Housing sales from the previous four reporting periods are also shown for comparison purposes (Table 37). The data is graphically represented in Charts 18, 19, and 20.

The cost of housing in Howard County has been increasing steadily, from a mean sales price of \$186,680 in 96/97 to \$236,421 last year for all housing types combined. This is an overall increase of 26.7 percent over the four year time period and an average annual increase of 6.1 percent.

Most of this increase is reflected in the cost of single family detached homes, with the mean price increasing by about \$81,000 from \$235,400 four years ago to \$315,500 last year, a 34 percent increase. About 30 percent of this increase has occurred in the last year alone and almost three-fourths of the increase has occurred in the last two years.

Table 37
Housing Sales by Type, 10/01/96 to 9/30/01

10/96 to 9/97				10/97 to 9/98			
Unit Type	# of Sales	Mean	Median	Unit Type	# of Sales	Mean	Median
Condo	316	\$90,969	\$84,500	Condo	320	\$86,827	\$82,000
MH	4	\$66,763	\$68,450	MH	3	\$67,966	\$68,000
SFA	1,320	\$133,076	\$131,000	SFA	1,661	\$139,254	\$136,000
SFD	2,104	\$235,447	\$219,900	SFD	2,991	\$248,800	\$234,407
TOTAL	3,744	\$186,680		TOTAL	4,975	\$201,698	
10/98 to 9/99				10/99 to 9/00			
Unit Type	# of Sales	Mean	Median	Unit Type	# of Sales	Mean	Median
Condo	492	\$113,137	\$110,107	Condo	432	\$100,702	\$89,900
MH	0	\$0	\$0	MH	1	\$79,900	\$79,900
SFA	1,643	\$140,356	\$136,000	SFA	1,758	\$145,863	\$139,900
SFD	2,896	\$257,305	\$235,452	SFD	3,010	\$291,510	\$276,418
TOTAL	5,031	\$205,013		TOTAL	5,201	\$226,390	
10/00 to 9/01							
Unit Type	# of Sales	Mean	Median				
Condo	576	\$103,835	\$89,900				
MH	7	\$90,629	\$88,500				
SFA	2,006	\$161,115	\$155,000				
SFD	2,889	\$315,499	\$294,990				
TOTAL	5,478	\$236,421					

For single family attached units there has been about a 21 percent increase in the mean sales price over the four year time period. More than half of this increase has occurred in the last year alone. Condominiums have increased by 14 percent over the four years.

During this period the number of annual sales have also increased each year, from 3,744 sales in 96/97 to 5,478 sales in 00/01, a 46 percent increase. These data reflect both new and existing units combined.

Nationally and regionally, the housing market has been strong over the last several years. Howard County is no exception. For Howard County in particular, it has been indicated by local builders and real estate agents that recent demand has exceeded supply, which has significantly contributed to the price increases. Low mortgage rates have also contributed.

Map 14 shows the housing sales by zip code in the County. Both the number of sales and the mean sales prices are shown.

Chart 18
Mean Sales Price by Unit Type

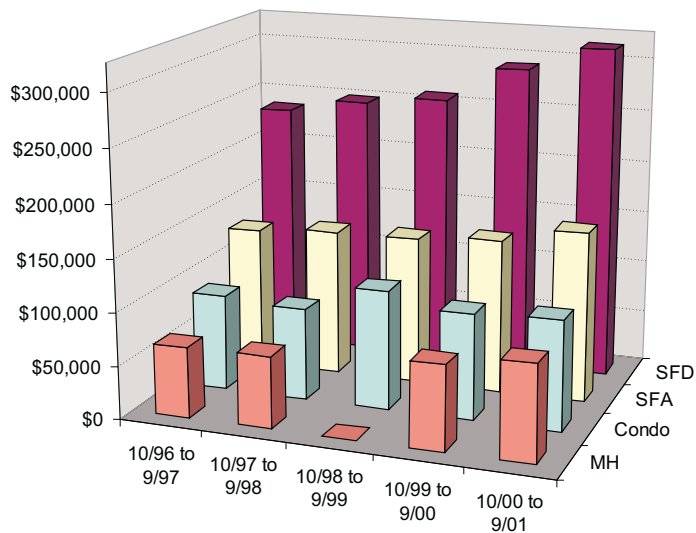


Chart 19
Median Sales Price by Unit Type

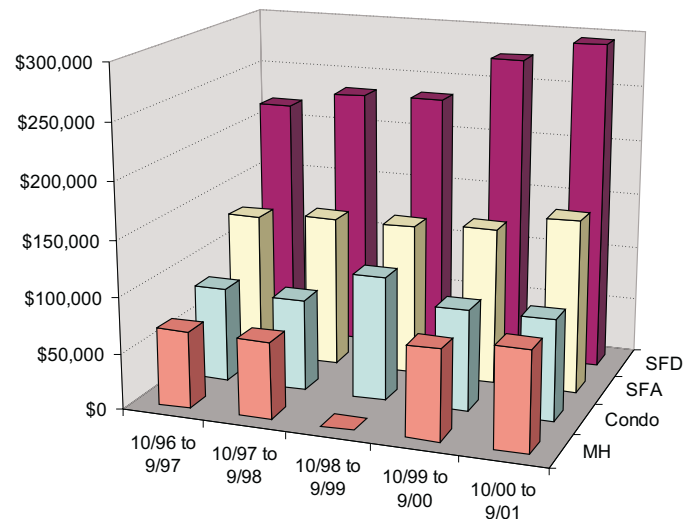
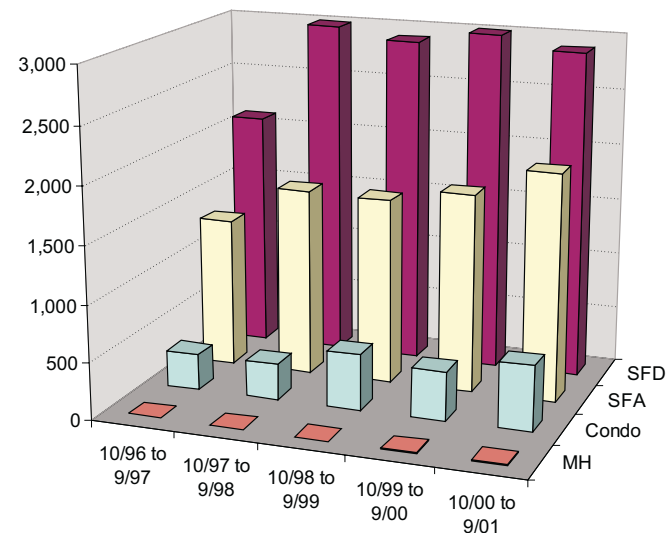
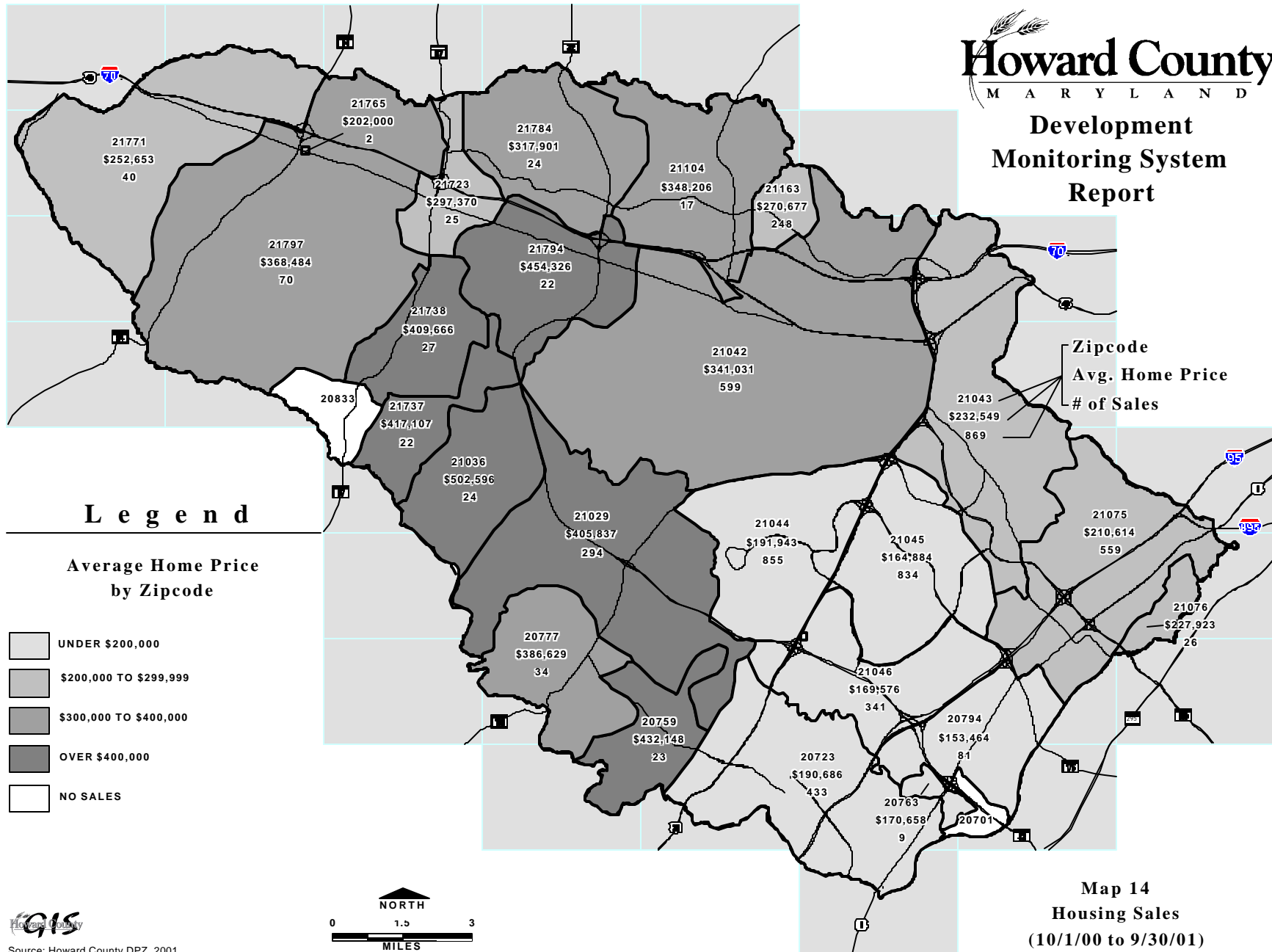


Chart 20
Number of Sales by Unit Type





Development Monitoring System Report



Land Preservation

Agricultural Land Preservation Program

Howard County's Agricultural Land Preservation Program has been the primary tool for preserving farmland. Most of the preserved farmland in this program is from the County's Purchase of Development Rights Program (PDR) where a farmer can voluntarily choose to sell a perpetual easement to the County while holding a fee simple title to the land and continuing to farm. The easement restricts development on the land and remains with the land even when it is sold.

The County's PDR program began in 1984 and continues today. Beginning in 1980 and continuing until 1988, agricultural land was also preserved through State purchased easements. These State purchases ended in 1988 primarily because of the prohibitive cost of land.

Farmland may also be preserved in the Agricultural Land Preservation Program through the dedication of preservation parcels as part of the development process, either as the dedication of sending parcels using the Density/Cluster Exchange Options (DEO/CEO) or the dedication of preservation parcels within cluster subdivisions. The DEO/CEO and cluster subdivision zoning regulations were established in 1992.

The County's PDR program reached its authorized funding limits in FY1997. As a result, in recent years, including this year's current DMS reporting period, there has been no agricultural preservation parcels purchased by the County. However, in the Spring of 2000, the County Council authorized an additional \$15 million in funding commitments. This funding will secure permanent easements on 2,500 to 3,000 additional acres over the next few years. As of December, 2001, there are 5 properties totaling about 750 acres under consideration by the Agricultural Land Preservation Board. The total installment purchase price of these properties is approximately \$4.5 million.

During the latest one year reporting period, 285 acres of agricultural preservation parcels were created in subdivisions through the development process and were enrolled in the Agricultural Land Preservation Program.

All of these were created through the dedication of sending parcels using the Density/Cluster Exchange Option and consist of six parcels ranging in size from approximately 32 to 82 acres.

As of September 30, 2000, there were 18,370 acres of permanently preserved agricultural land. This includes 12,801 acres of purchased easements through the County's PDR Program, 3,937 acres of purchased easements by the State and 1,632 preservation acres dedicated as part of the development process (Table 38).

Table 38
Agricultural Preservation Easements, September 30, 2001

Type	Acres	Percent
County Purchased Agric. Easements	12,801	70%
State Purchased Agric. Easements	3,937	21%
Dedicated Agric. Preservation Parcels	1,632	9%
TOTAL	18,370	100%

Dedicated Easement Properties

As previously indicated, last year 285 acres of agricultural preservation parcels were created through the development process and were enrolled in the Agricultural Land Preservation Program. This brings the total acres of land dedicated to date in this manner to 1,632 acres.

Besides agricultural easements, there are additional ways parcels are preserved through the development process. Last year, 511 acres of land were dedicated as joint Howard County/Homeowner's Association preservation parcels, the only other preservation category that received additional acreage. Table 39 shows the land preservation totals from dedicated easements to date including land preserved in the Agricultural Land Preservation Program, as well as joint Howard County/Homeowner's Association parcels and other easement types.

Since 1992, preservation easements on 5,603 acres have been created by cluster development and the Density/Cluster Exchange Options. Including open space, the total comes to 5,960 acres.

The majority of the total dedicated preservation easements, 3,401 acres, are jointly held by Howard County and various homeowner's associations. As indicated earlier, 1,632 acres are held by the Howard County Agricultural Land Preservation Program. About 440 acres are jointly held by the Howard County Conservancy and Howard County. The remaining 130 acres are jointly held by Howard County and the Audubon Society and by homeowner's associations and the Audubon Society.

Table 39 also indicates the extent of the developed land resulting from the DEO/CEO and cluster zoning. Since 1992, a total of 8,323 acres have been subdivided in the rurally zoned land in the West. About 28 percent of this total, or 2,363 acres, is used for the development of residential lots and road right of ways. The remaining 72 percent, or 5,960 acres, is land in dedicated preservation easements and open space as described earlier. Of the 2,363 acres for residential development, about 748 acres are yet undeveloped, 1,403 acres are developed and 212 acres are for roads.

Preserved easements in the Rural West discussed above total 22,341 acres. This includes all 18,370 acres of agricultural preservation easements and 3,971 acres of other preservation parcels dedicated through the subdivision process. This represents about 24 percent of the approximate 94,660 total acres of land in the Rural West.

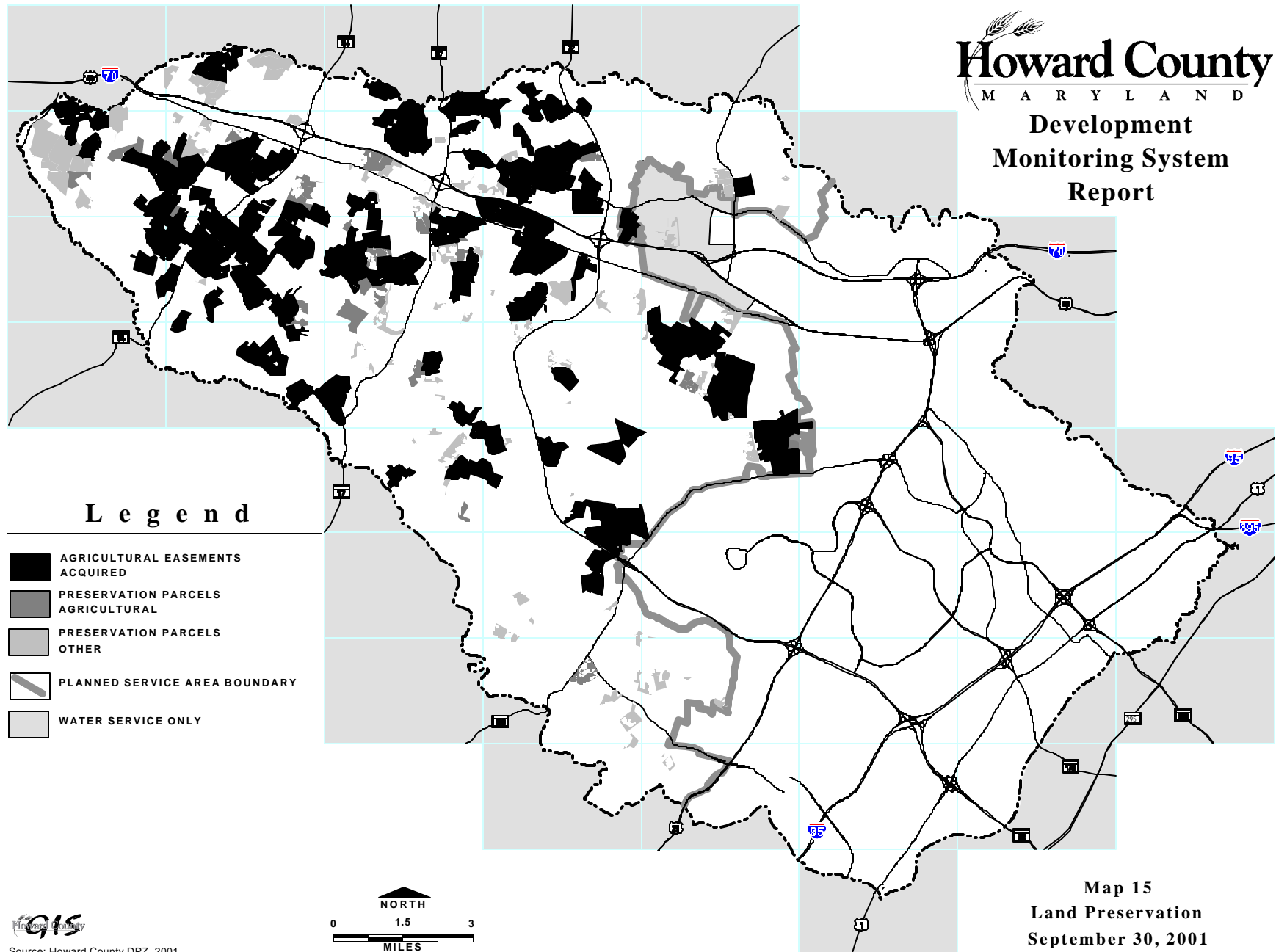
Map 15 shows the preserved land in Howard County as of September 30, 2001 including acquired (purchased) agricultural easements and dedicated agricultural and other preserved parcels.

Total Preserved Land in the Rural West

Including County and State parks and open space and WSSC land (9,300 acres), permanent historic easements (130 acres) and other environmental easements (940 acres) the total preserved land amounts to 32,700 acres, about 35 percent of all land in the Rural West.

Table 39
Land Preservation Through Dedicated Easements

Residential Unit Cluster Development	Lots	Acres	
Undeveloped Lots (By Right)	374	464	
Undeveloped Lots (From Density Transfer)	258	284	
Total Undeveloped Lots	632	748	
Developed Lots (By Right)	922	1,075	
Developed Lots (From Density Transfer)	315	328	
Total Developed Lots	1,237	1,403	
Roadway		212	
TOTAL	1,869	2,363	28.4%
Open Space and Preservation	Lots	Acres	
Agricultural Preservation	45	1,632	
Howard County/Homeowner's Association	213	3,401	
Howard County/The Audubon Society	3	69	
Homeowner's Assoc./The Audubon Society	2	61	
Howard County Conservancy/Howard County	20	440	
Total Preservation	283	5,603	
Open Space (Dedicated to County)	10	58	
Open Space (Not Dedicated to County)	63	299	
Total Open Space	73	357	
TOTAL	356	5,960	71.6%
GRAND TOTAL (Includes Res. Develop.)	2,225	8,323	100.0%



Non-Residential Development

Recorded Non-Residential Subdivisions

For this report, non-residential development is tabulated within four regions as shown on Map 16. The number of non-residential *plans* recorded, the number of non-residential *lots* created, and the *acreage* of plans recorded have been compiled for each of these regions and are discussed below. The analysis includes last year's subdivision activity as well as activity for the last five years.

Summary of Last Year's Results

Last year there were 89 non-residential lots recorded countywide in 45 subdivision plans totaling 835 acres (Table 40). The I-95 Corridor had the most lots with 40, or 45 percent of the total. Columbia had 40 percent of the total with 36 recorded lots. The West had 9 recorded lots last year, followed by Ellicott City with 4 recorded lots. Of the 45 subdivision plans recorded last year, 40 percent each were in the I-95 Corridor and Columbia, followed by 13 percent in the West and 7 percent in Ellicott City.

Of the total 835 acres of non-residential land recorded, 468 acres, or 56 percent, were in the I-95 Corridor. A total of 261 acres were recorded in Columbia (31 percent). In the West and in Ellicott City there were 53 recorded acres last year representing 6 percent of the total for each.

Table 41 shows the number of recorded lots by development type. Of the 89 lots recorded last year, 50 were for industrial uses, 16 for commercial uses (which includes retail and office space), and 8 were for institutional uses. There were also 15 other lots recorded for open space, easements and paved surfaces. Most of the new commercial lots were in Columbia. Most of the industrial lots were in the I-95 Corridor and Columbia. There were three institutional lots each recorded in Columbia and Ellicott City and one each in the I-95 Corridor and the West.

Table 40
Recorded Non-Residential Subdivisions, 10/01/00 to 9/30/01

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	36	40%	18	40%	261	31%
Ellicott City	4	4%	3	7%	53	6%
I-95 Corridor	40	45%	18	40%	468	56%
West	9	10%	6	13%	53	6%
TOTAL	89	100%	45	100%	835	100%

Table 41
Recorded Lots by Development Type, 10/01/00 to 9/30/01

Region	Com.	Ind.	Inst.	Other ¹	TOTAL
Columbia	12	13	3	8	36
Ellicott City	0	0	3	1	4
I-95 Corridor	1	32	1	6	40
West	3	5	1	0	9
TOTAL	16	50	8	15	89
PERCENT	18%	56%	9%	17%	100%

1. Includes easements, open space and paved areas (roadway).

Last Year's Projects - Greater than 50 Acres

Of the total 835 non-residential acres recorded last year, a little more than 252 acres, about 30 percent of the total, were in two subdivisions more than 50 acres in size. These larger subdivisions are shown in Table 42. The location of these plans are shown on Map 16.

One of these larger subdivisions consisted of 58.5 acres recorded in Columbia Gateway. The other subdivision known as the Patapsco Valley Business Center located in the I-95 Corridor included a total of almost 194 acres.

Five Year Results

Table 43 shows the recorded non-residential subdivisions for the last five years from October 1, 1996 to September 30, 2001. Over this five year period there were 533 non-residential lots recorded countywide in 227 subdivision plans totaling 4,896 acres. This equates to a five year average of 979 recorded acres per year. Over the five year period, 54 percent of the acreage was in Columbia, 28 percent in the I-95 Corridor, 10 percent in Ellicott City, and 8 percent in the West.

Table 44 shows the total non-residential acreage recorded by year for each of the last five years. There was less recorded acreage last year compared to the previous two years – 835 acres last year compared to 1,190 acres in 1999/2000 and 1,234 acres in 1998/1999. This is about a 30 percent reduction. Chart 21 shows these results graphically by region. It is apparent that Columbia has had the most activity over the five year period with more than 54 percent of the total countywide acreage recorded there. However,

Table 42
Recorded Non-Residential Subdivision Plans, Plans With More Than 50 Acres, 10/01/00 to 9/30/01

Region	File Number	Plan Name	Type	Acres	TOTAL
Columbia	F-00-132	Columbia Gateway	Industrial	58.5	58.5
I-95 Corridor	F-94-024	Patapsco Valley Business Center	Industrial	193.8	193.8
TOTAL					252.3

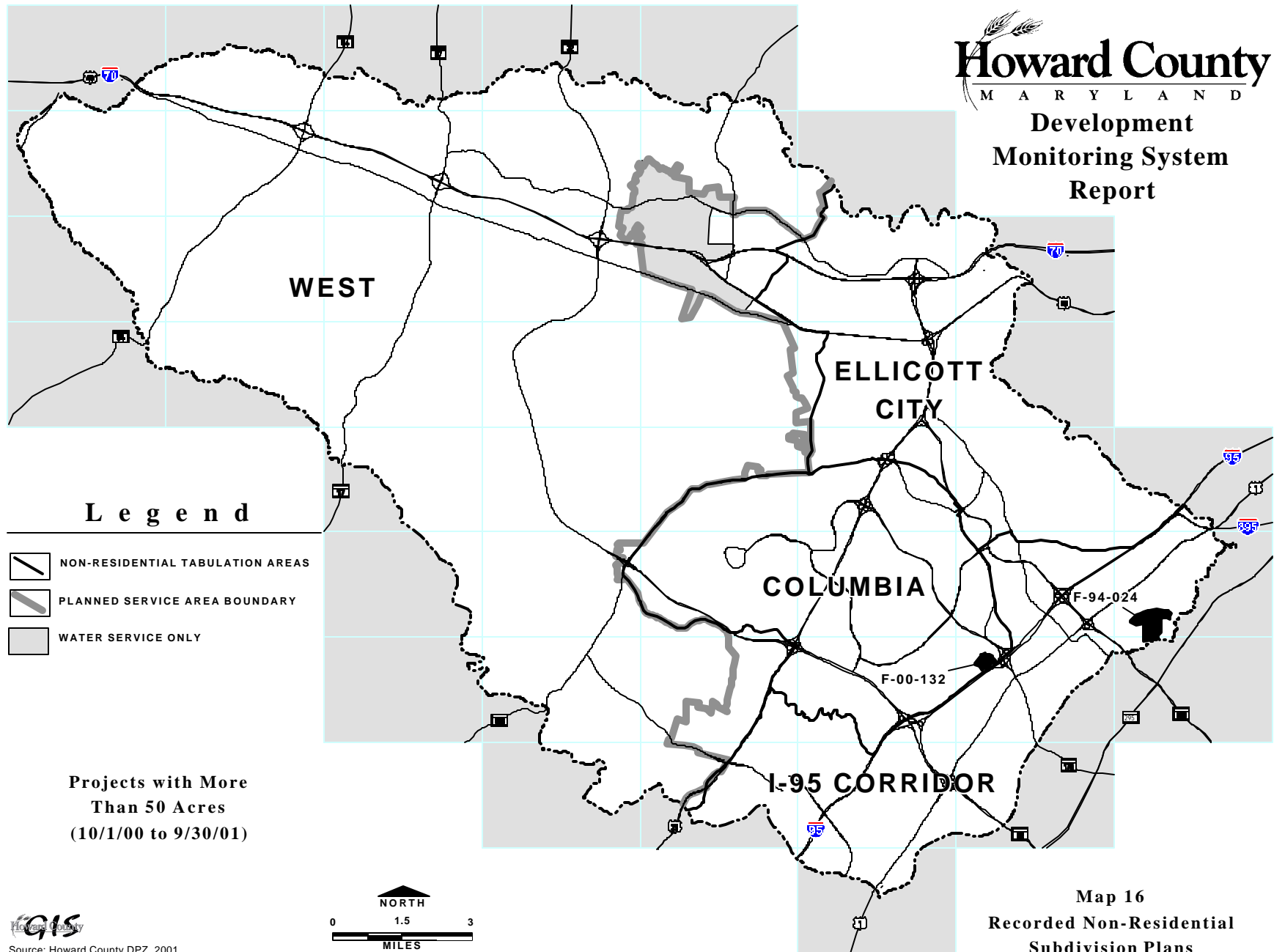


Table 43
Recorded Non-Residential Subdivisions, 10/01/96 to 9/30/01

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	272	51%	106	47%	2,638	54%
Ellicott City	73	14%	36	16%	398	8%
I-95 Corridor	120	23%	55	24%	1,379	28%
West	68	13%	30	13%	481	10%
TOTAL	533	100%	227	100%	4,896	100%
5 YEAR AVG.	107		45		979	

the trend over the last three years shows a slowdown of recorded acreage in Columbia and an increase in the I-95 Corridor. It should be noted that the recorded acreage includes resubdivisions and does not reflect net new recorded non-residential acreage.

Table 45 summarizes the number of lots by development type for each of the last five years. The five year total by development type is also shown in the bottom right hand corner of the table. For the five year period, commercial lots comprised 38 percent of the total 533 recorded lots. This is followed by industrial lots at 36 percent of the total and other lots at 21 percent of the total. (Other lots include easements, recreation parcels, open space, a golf course, cemeteries, non-buildable parcels, stormwater management areas and roadways.) Institutional lots consisted of the remaining 5 percent of the five year total.

Chart 21
Recorded Non-Residential Acres

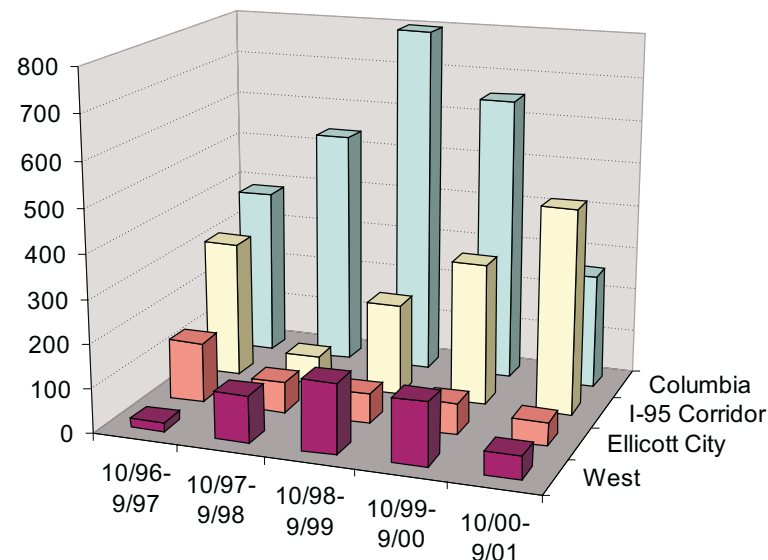


Table 44
Recorded Non-Residential Acreage, 10/01/96 to 9/30/01

Region	10/96-9/97	10/97-9/98	10/98-9/99	10/99-9/00	10/00-9/01	TOTAL	PERCENT
Columbia	385	540	799	653	261	2,638	54%
Ellicott City	137	70	67	71	53	398	8%
I-95 Corridor	314	65	209	323	468	1,379	28%
West	20	106	159	143	53	481	10%
TOTAL	856	781	1,234	1,190	835	4,896	100%

Table 45
Number of Non-Residential Recorded Lots by Development Type, 10/01/96 to 9/30/01

10/96 to 9/97						10/97 to 9/98					
Region	Com.	Ind.	Inst.	Other ¹	TOTAL	Com.	Ind.	Inst.	Other ¹	TOTAL	
Columbia	47	17	6	11	81	22	15	4	4	45	
Ellicott City	22	0	0	1	23	7	0	4	2	13	
I-95 Corridor	8	12	0	3	23	7	4	0	1	12	
West	0	0	0	1	1	0	5	0	3	8	
TOTAL	77	29	6	16	128	36	24	8	10	78	
PERCENT	60%	23%	5%	13%	100%	46%	31%	10%	13%	100%	

10/98 to 9/99						10/99 to 9/00					
Region	Com.	Ind.	Inst.	Other ¹	TOTAL	Com.	Ind.	Inst.	Other ¹	TOTAL	
Columbia	9	17	2	23	51	17	21	1	20	59	
Ellicott City	10	2	0	5	17	15	0	1	0	16	
I-95 Corridor	2	11	0	3	16	2	22	1	4	29	
West	13	8	0	8	29	5	7	1	8	21	
TOTAL	34	38	2	39	113	39	50	4	32	125	
PERCENT	30%	34%	2%	35%	100%	31%	40%	3%	26%	100%	

10/00 to 9/01						TOTAL 10/96 to 9/01					
Region	Com.	Ind.	Inst.	Other ¹	TOTAL	Com.	Ind.	Inst.	Other ¹	TOTAL	
Columbia	12	13	3	8	36	107	83	16	66	272	
Ellicott City	0	0	3	1	4	54	2	8	9	73	
I-95 Corridor	1	32	1	6	40	20	81	2	17	120	
West	3	5	1	0	9	21	25	2	20	68	
TOTAL	16	50	8	15	89	202	191	28	112	533	
PERCENT	18%	56%	9%	17%	100%	38%	36%	5%	21%	100%	

1. Includes access easements, recreation parcels/open space/golf course, cemeteries, non-buildable parcels, stormwater management, and roadway.

In-Process Non-Residential Subdivisions

This section summarizes non-residential subdivisions in process. Subdivision plans in four stages (sketch, preliminary equivalent sketch, preliminary, and final) are reported. The number of plans, potential lots and acreage currently being processed as of September 30, 2001 are tabulated and compared with those in process a year earlier (as of September 30, 2000).

Number of Plans

Countywide, there were 30 non-residential plans in process as of September 30, 2001, close to the same number last year when there were 29 plans in process (Table 46). Similar to the previous year, most plans were in the

I-95 Corridor (14 plans). There were also 8 plans each in Columbia and the West last year.

For both years most of the plans were in the Final Plan stage. This is primarily due to the relatively high number of resubdivisions which only come in at the Final Plan stage.

Number of Lots

Table 47 shows the number of potential non-residential lots in process. As of September 30, 2001, there were 71 lots in process, 7 more than the 64 in process on September 30, 2000.

Table 46
Number of Non-Residential Plans in Process, 09/30/00 and 09/30/01

Region	Sketch		Preliminary Equivalent Sketch		Preliminary		Final		TOTAL PLANS	
	2000	2001	2000	2001	2000	2001	2000	2001	2000	2001
Columbia	0	0	2	1	0	0	6	7	8	8
Ellicott City	0	0	0	0	0	0	1	0	1	0
I-95 Corridor	0	1	1	1	1	1	14	11	16	14
West	2	3	0	0	1	1	1	4	4	8
TOTAL	2	4	3	2	2	2	22	22	29	30

Table 47
Number of Potential Non-Residential Lots from Subdivision Plans in Process, 09/30/00 and 09/30/01

Region	Sketch		Preliminary Equivalent Sketch		Preliminary		Final		TOTAL LOTS	
	2000	2001	2000	2001	2000	2001	2000	2001	2000	2001
Columbia	0	0	10	2	0	0	12	15	22	17
Ellicott City	0	0	0	0	0	0	1	0	1	0
I-95 Corridor	0	1	2	16	4	5	30	23	36	45
West	2	3	0	0	1	1	2	5	5	9
TOTAL	2	4	12	18	5	6	45	43	64	71

Most of the non-residential lots in process for both years were in the I-95 Corridor. Columbia had the second highest number of lots, followed by the West. There were no lots in process in Ellicott City on September 30, 2001. Table 50 shows a more detailed breakdown of the number of non-residential lots in process by development type for this most recent year and for one year earlier.

Number of Acres

There were a total of 1,265 non-residential acres in the subdivision process as of September 30, 2001 (Table 48). This compares to 756 acres in pro-

cess one year earlier. For the current year most of the acreage is in the West (718 acres). This is followed by the I-95 Corridor with 388 acres and Columbia with 159 acres.

Major Projects

Of the 1,265 acres of non-residential land in process, 1,126 acres (close to 90 percent) are for projects greater than 50 acres (Table 49). The largest of these are 361 acres in the West as part of the Johns Hopkins Applied Physics Lab expansion. There are also 190 acres in process for the new Western Regional Park. Map 17 shows the locations of these projects.

Table 48
Acreage of Non-Residential Subdivision Plans in Process, 09/30/00 and 09/30/01

Region	Sketch		Preliminary Equivalent Sketch		Preliminary		Final		TOTAL PLANS	
	2000	2001	2000	2001	2000	2001	2000	2001	2000	2001
Columbia	0	0	118	16	0	0	110	143	228	159
Ellicott City	0	0	0	0	0	0	1	0	1	0
I-95 Corridor	0	84	8	99	76	71	356	134	440	388
West	66	504	0	0	17	17	4	197	87	718
TOTAL	66	588	126	115	93	88	471	474	756	1,265

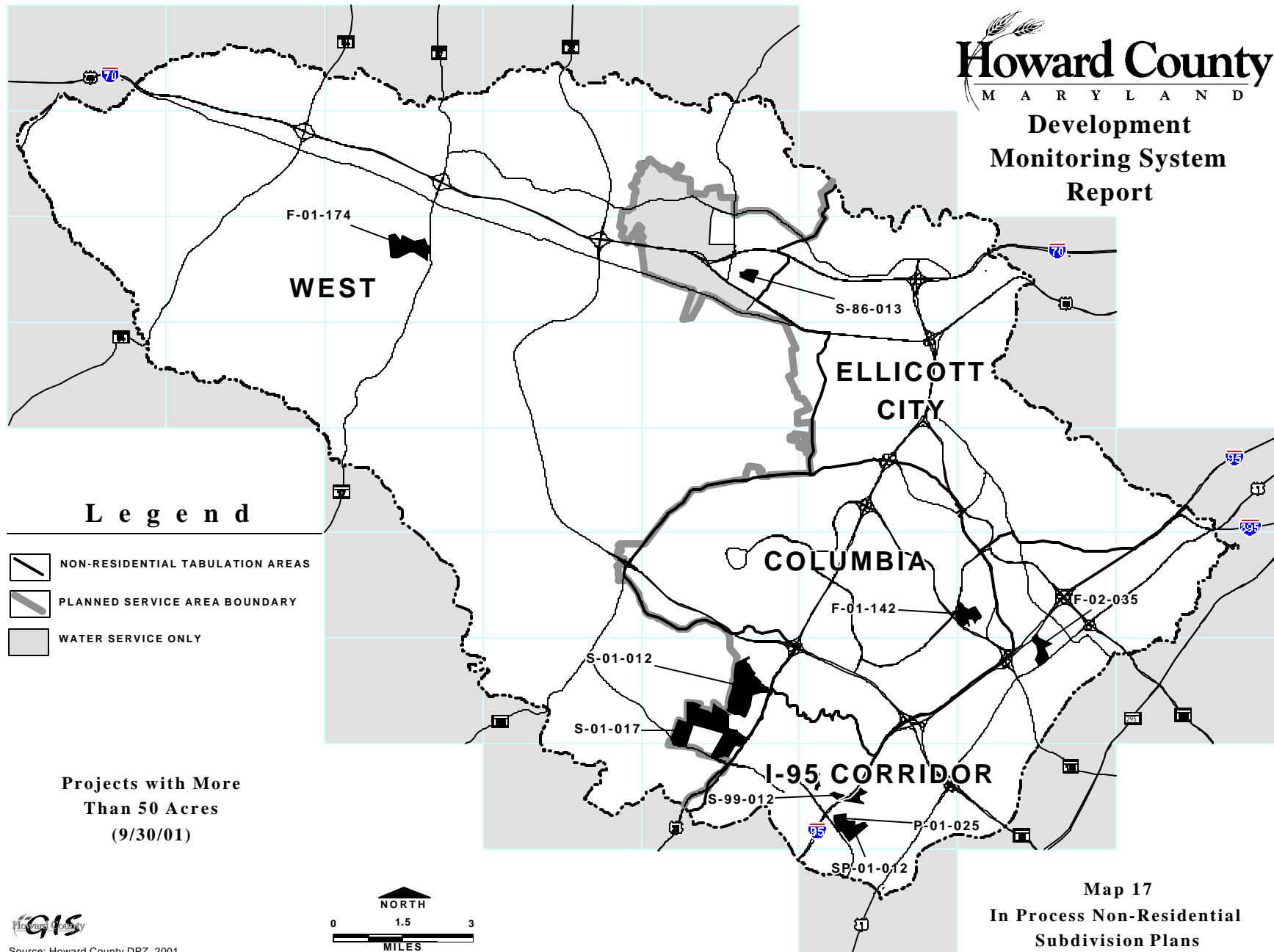
Table 49
In-Process Non-Residential Subdivision Plans, Plans With More Than 50 Acres, 09/30/01

Region	File Number	Plan Name	Type	Acres	TOTAL
Columbia	F-01-142	Snowden River Business Park	Commercial	102	102
West	S-01-012	Johns Hopkins University - APL	Commercial-Offices	361	694
	F-01-174	Western Regional Park	Other-Park	190	
	S-01-017	Maple Lawn	Employment	77	
	S-86-013	Turf Valley	Commercial-Offices	66	
I-95 Corridor	SP-01-012	Revitz Property	Commercial-Parcels	99	330
	S-99-012	Emerson (Key Property)	Commercial-Parcels	84	
	F-02-035	Blue Stream Corporate Center	Industrial-Parcels	76	
	P-01-025	Emerson (Key Property)	Commercial-Parcels	71	
TOTAL					1,126

Table 50
Number of Potential Lots From Non-Residential Subdivision Plans in Process by Development Type, 09/30/00 and 09/30/01

09/30/01 ==> Sketch						Preliminary Equivalent Sketch					
Region	Com.	Ind.	Inst.	Other ¹	TOTAL	Com.	Ind.	Inst.	Other ¹	TOTAL	
Columbia	0	0	0	0	0	1	0	0	1	2	
Ellicott City	0	0	0	0	0	0	0	0	0	0	
I-95 Corridor	1	0	0	0	1	8	0	0	8	16	
West	3	0	0	0	3	0	0	0	0	0	
TOTAL	4	0	0	0	4	9	0	0	9	18	
09/30/01 ==> Preliminary						Final					
Region	Com.	Ind.	Inst.	Other ¹	TOTAL	Com.	Ind.	Inst.	Other ¹	TOTAL	
Columbia	0	0	0	0	0	4	3	0	8	15	
Ellicott City	0	0	0	0	0	0	0	0	0	0	
I-95 Corridor	3	0	0	2	5	5	8	0	10	23	
West	1	0	0	0	1	2	0	0	3	5	
TOTAL	4	0	0	2	6	11	11	0	21	43	
09/30/00 ==> Sketch						Preliminary Equivalent Sketch					
Region	Com.	Ind.	Inst.	Other ¹	TOTAL	Com.	Ind.	Inst.	Other ¹	TOTAL	
Columbia	0	0	0	0	0	5	0	0	5	10	
Ellicott City	0	0	0	0	0	0	0	0	0	0	
I-95 Corridor	0	0	0	0	0	2	0	0	0	2	
West	2	0	0	0	2	0	0	0	0	0	
TOTAL	2	0	0	0	2	7	0	0	5	12	
09/30/00 ==> Preliminary						Final					
Region	Com.	Ind.	Inst.	Other ¹	TOTAL	Com.	Ind.	Inst.	Other ¹	TOTAL	
Columbia	0	0	0	0	0	5	3	0	4	12	
Ellicott City	0	0	0	0	0	0	0	0	1	1	
I-95 Corridor	0	4	0	0	4	1	22	1	6	30	
West	1	0	0	0	1	2	0	0	0	2	
TOTAL	1	4	0	0	5	8	25	1	11	45	
						TOTAL - 09/30/00					
						Com.	Ind.	Inst.	Other ¹	TOTAL	
						5	3	0	9	17	
						0	0	0	0	0	
						17	8	0	20	45	
						6	0	0	3	9	
						28	11	0	32	71	
						TOTAL - 09/30/01					
						Com.	Ind.	Inst.	Other ¹	TOTAL	
						10	3	0	9	22	
						0	0	0	1	1	
						3	26	1	6	36	
						5	0	0	0	5	
						18	29	1	16	64	

1. Includes access easements, open space, stormwater management, and roadway.



Approved Non-Residential Site Development Plans

The site development plan (SDP) process is usually the next development stage after lots are recorded. Once an SDP is approved, building permits can be issued after which actual land development can begin. Similar to subdivision activity, non-residential site development activity is tabulated by four regions. The number of non-residential site development *plans* approved, the number of *lots* approved, and the *acreage* of approved plans have been compiled for each of these regions and are discussed below.

Additionally, the square footage of floor space in approved site development plans is compiled. This is useful to estimate employment, which is discussed later in this report (Page 78). The analysis includes last year's site development plan activity as well as activity for the last five years.

Summary of Last Year's Results

Last year there were 88 non-residential lots approved countywide in 77 site development plans totaling about 953 acres (Table 51). Columbia had the most activity with 39 lots approved, 44 percent of the total. The I-95 Corridor had 31 percent of the total with 27 approved lots. Ellicott City had 13 approved lots last year, followed by the West with 9 approved lots. Of the 77 site development plans approved last year, 31 were in Columbia, followed by 24 in the I-95 Corridor, 13 in Ellicott City and 9 in the West.

Region	Lots		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	39	44%	31	40%	320	34%
Ellicott City	13	15%	13	17%	73	8%
I-95 Corridor	27	31%	24	31%	453	48%
West	9	10%	9	12%	107	11%
TOTAL	88	100%	77	100%	953	100%

Of the total 953 acres of non-residential land approved in site development plans, 453 acres, or 48 percent, were in the I-95 Corridor. A total of 320 acres were approved in Columbia (34 percent). In the West there were 107 approved acres last year representing 11 percent of the total. The least amount of non-residential acreage was recorded in Ellicott City with 73 acres representing 8 percent of the total.

Table 52 shows the number of approved lots by development type. Of the 88 lots recorded last year, 24 are for office/service uses, 19 each are for manufacturing/extensive industrial and government & institutional uses and 13 are for retail uses. There were also 13 other lots approved for open space, paved surfaces and other uses. Most of the new lots are in Columbia, followed by the I-95 Corridor, Ellicott City and the West.

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	6	14	3	7	9	39
Ellicott City	4	4	0	4	1	13
I-95 Corridor	2	4	16	3	2	27
West	1	2	0	5	1	9
TOTAL	13	24	19	19	13	88

1. Includes open space, paved surfaces, pumping station, wireless communication site, and park.

Table 53 shows the square footage of building space in last year's approved site development plans by type of use. Countywide, there was almost 3.9 million square feet of building space approved. About 59 percent of this total, 2.29 million square feet, was in the I-95 Corridor. About 1.26 million square feet was in Columbia (33 percent). The West had about 220,000 square feet approved (6 percent), followed by Ellicott City with about 94,000 square feet (2 percent).

Slightly more than 46 percent of the total building space is for office/service uses totaling 1.8 million square feet. This is followed by manufacturing/extensive industrial space with almost 1.6 million square feet of approved building space (41 percent). About 367,000 square feet are for government and institutional uses (10 percent), and about 130,000 square feet are for retail use (3 percent).

Table 53 Building Square Feet in Approved Site Development Plans, 10/01/00 to 9/30/01						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other¹	TOTAL
Columbia	63,728	916,932	153,206	127,111	0	1,260,977
Ellicott City	14,555	20,401	0	59,030	139	94,125
I-95 Corridor	49,160	796,563	1,421,193	28,352	0	2,295,268
West	2,237	65,930	0	152,185	0	220,352
TOTAL	129,680	1,799,826	1,574,399	366,678	139	3,870,722
PERCENT	3.4%	46.5%	40.7%	9.5%	0.0%	100.0%
1. Includes non-employee generating pumping station space.						

Last Year's Projects - Greater than 100,000 Square Feet

Of the almost 3.9 million square feet of non-residential building space approved in site development plans last year, almost 2.8 million square feet, about 72 percent of the total, were in plans with more than 100,000 square feet. These larger plans are shown in Table 54. The location of these plans are shown on Map 18.

In Columbia, four plans with more 100,000 square feet of building space were approved last year. These plans, located in various parts of Columbia as described in Table 54, total almost 742,000 square feet. Along the I-95 Corridor, nine larger plans were approved totaling more than 2 million square feet.

Five Year Results

Table 55 shows the approved non-residential site development plans for the last five years from October 1, 1996 to September 30, 2001. Over this five year period there were 461 non-residential lots approved countywide

Table 54 Projects With More Than 100,000 Square Feet in Approved Non-Residential Site Development Plans, 10/01/00 to 9/30/01					
Region	File Number	Plan Name	Use	Building Area	TOTAL
Columbia	SDP-01-026	Columbia Gateway	Office/Service-Offices/Bank	258,480	741,598
	SDP-01-053	Gateway Commerce Center	Office/Service-Offices	245,993	
	SDP-01-076	EZ Storage Columbia	Manu/Ind-Self Storage Facility	131,275	
	SDP-00-149	Columbia Gateway	Office/Service-R&D/Warehouse	105,850	
I-95 Corridor	SDP-01-010	Prologis Park	Manu/Ind-Warehouse/Office	481,583	2,052,750
	SDP-01-068	Columbia Corporate Park 100	Office/Service-Offices/Daycare	368,712	
	SDP-01-082	Troy Hill Circle	Manu/Ind-Warehouse/Office	318,361	
	SDP-01-030	Troy Hill Corporate Center	Manu/Ind-Parcels	184,004	
	SDP-00-119	Lyndwood Square	Office/Service-Offices	169,150	
	SDP-01-037	Troy Hill Corporate Center	Office/Service	150,000	
	SDP-01-014	Dorsey Run Industrial Park	Manu/Ind-Warehouse/Office	142,800	
	SDP-99-119	Freestate	Manu/Ind-Warehouse/Office	125,170	
	SDP-01-054	Stayton Business Center II	Manu/Ind-Warehouse/Office	112,970	
TOTAL					2,794,348

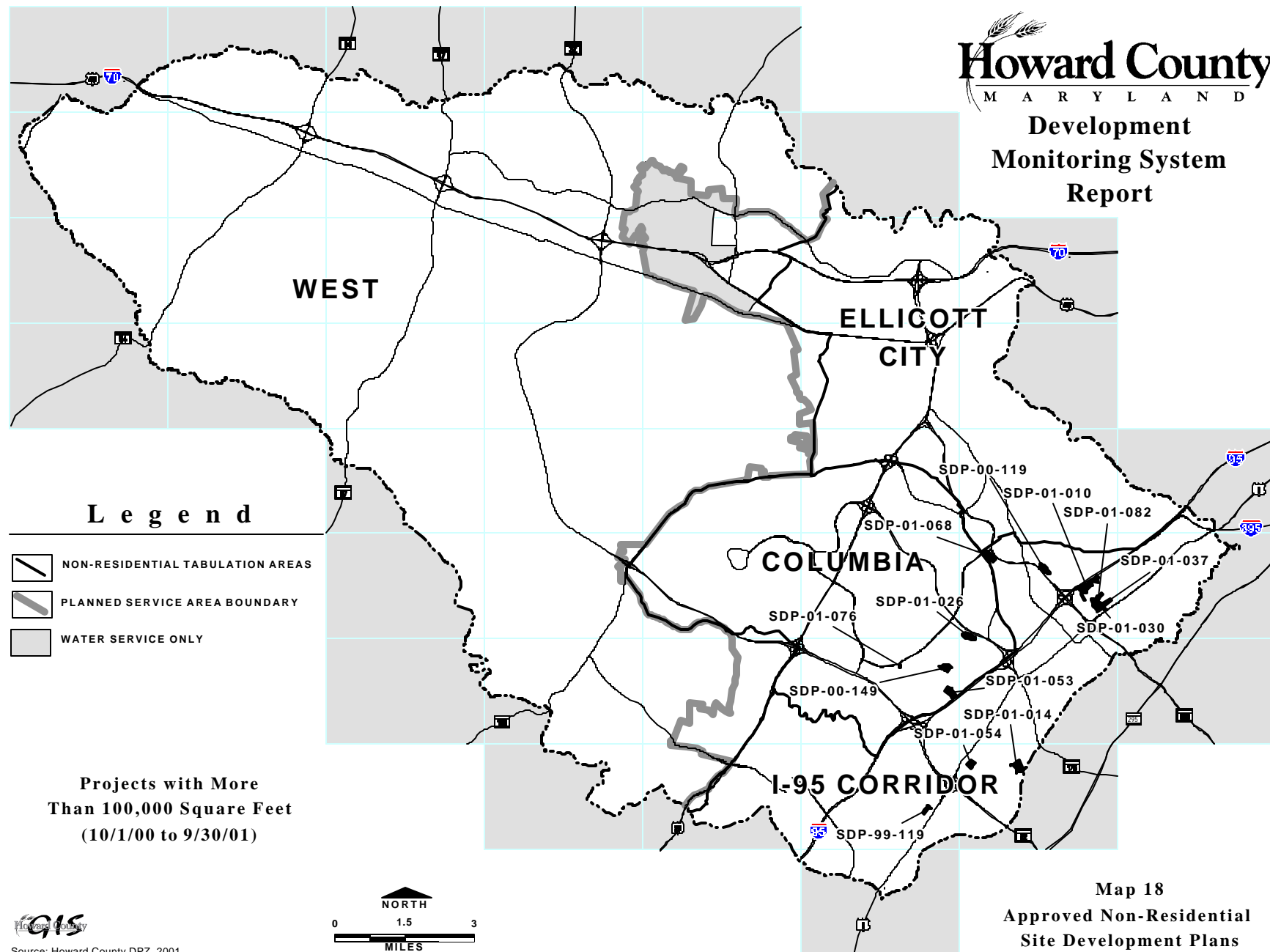


Table 55
Approved Non-Residential Site Development Plans, 10/01/96 to 9/30/01

Region	Lots		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	213	46%	141	38%	1,528	38%
Ellicott City	73	16%	67	18%	458	11%
I-95 Corridor	117	25%	105	28%	1,227	30%
West	58	13%	57	15%	828	20%
TOTAL	461	100%	370	100%	4,041	100%
5 YEAR AVG.	92		74		808	

in 370 plans totaling 4,041 acres. This equates to a five year average of 808 approved acres per year. Over the five year period, 38 percent of the acreage was in Columbia, 30 percent in the I-95 Corridor, 20 percent in the West and 11 percent in Ellicott City.

Table 56 shows the total non-residential acreage approved by year for each of the last five years. Last year, about 200 more acres were approved compared to the previous two years – 953 acres last year compared to 758 and 772 acres for the previous two years, respectively.

Table 57 summarizes the approved square footage by development type for each of the last five years. The five year total by development type is also shown in the bottom right hand corner of the table. For the five year period, about 17.2 million square feet of non-residential space has been approved in the County. This is an average of about 3.4 million square feet per year.

Of this total, close to 40 percent or 6.8 million square feet are for office/service space. Almost 38 percent or 6.5 millions square feet are for manufacturing/extensive industrial development (which includes warehouse space). Retail space accounts for about 14 percent of the total with about 2.3 million square feet approved. Government and institutional uses account for about 8 percent of the approved building space (about 1.4 million square feet). The remaining 1 percent (171,000 square feet) are for other uses.

Chart 22
Approved Non-Residential Square Feet (X 1,000)

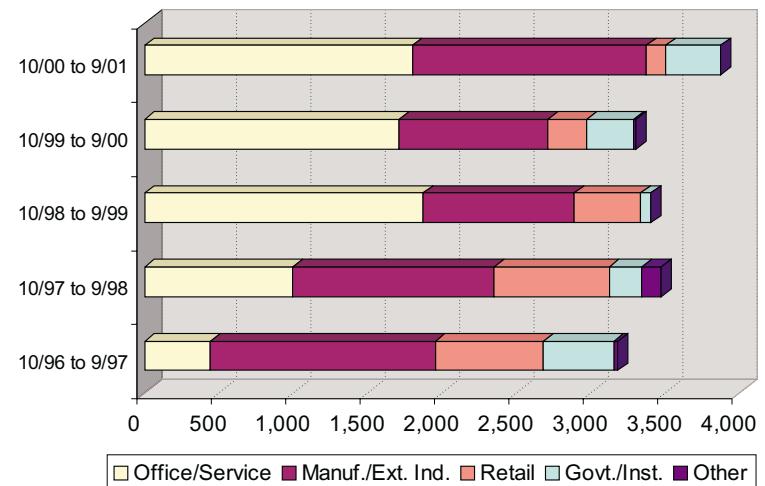


Table 56
Acreage in Approved Non-Residential Site Development Plans, 10/01/96 to 9/30/01

Region	10/96-9/97	10/97-9/98	10/98-9/99	10/99-9/00	10/00-9/01	TOTAL	PERCENT
Columbia	417	331	160	300	320	1,528	38%
Ellicott City	202	16	68	99	73	458	11%
I-95 Corridor	195	82	259	239	453	1,227	30%
West	192	123	286	121	107	828	20%
TOTAL	1,006	551	772	758	953	4,041	100%

Chart 22 graphically shows the countywide square footage approved by development type for each of the five years. It is clear that in recent years the greatest amount of approved development is for office/service and manufacturing/extensive industrial building space. The amount of retail space approval has generally slowed over the five year period.

Chart 23 shows the five year approved square footage total by development type by region. It is clear that the I-95 Corridor has had the most manufacturing/extensive industrial square footage approved followed by Columbia. Columbia has had the most office/service and retail square footage approved over the five year period.

Chart 24 shows the total non-residential square footage approved over time for each region. Overall, Columbia and the I-95 Corridor have had the most square footage approved, followed by Ellicott City and then the West.

Table 57 reflects these results numerically.

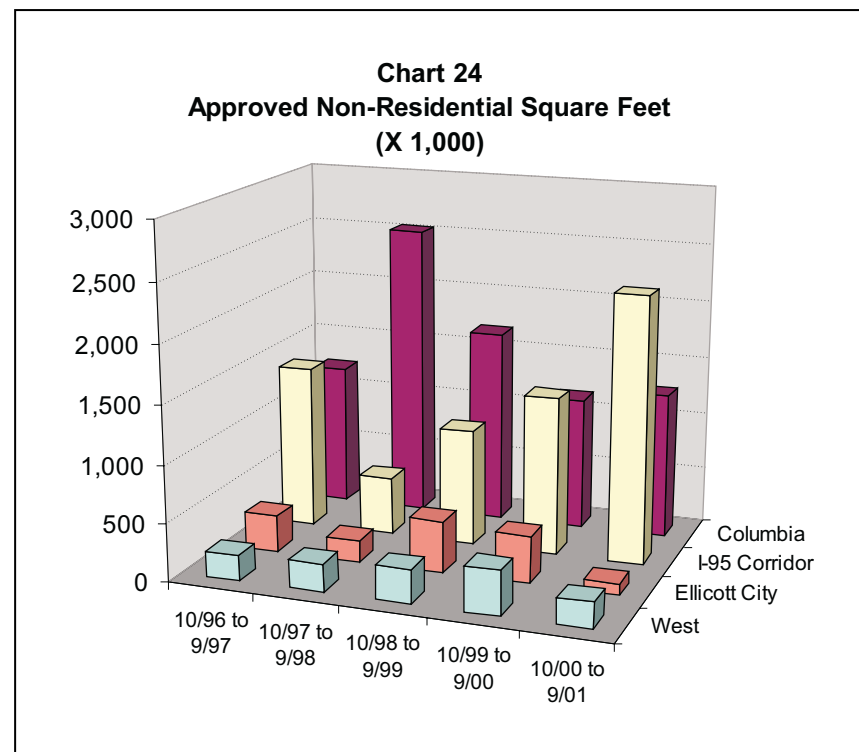
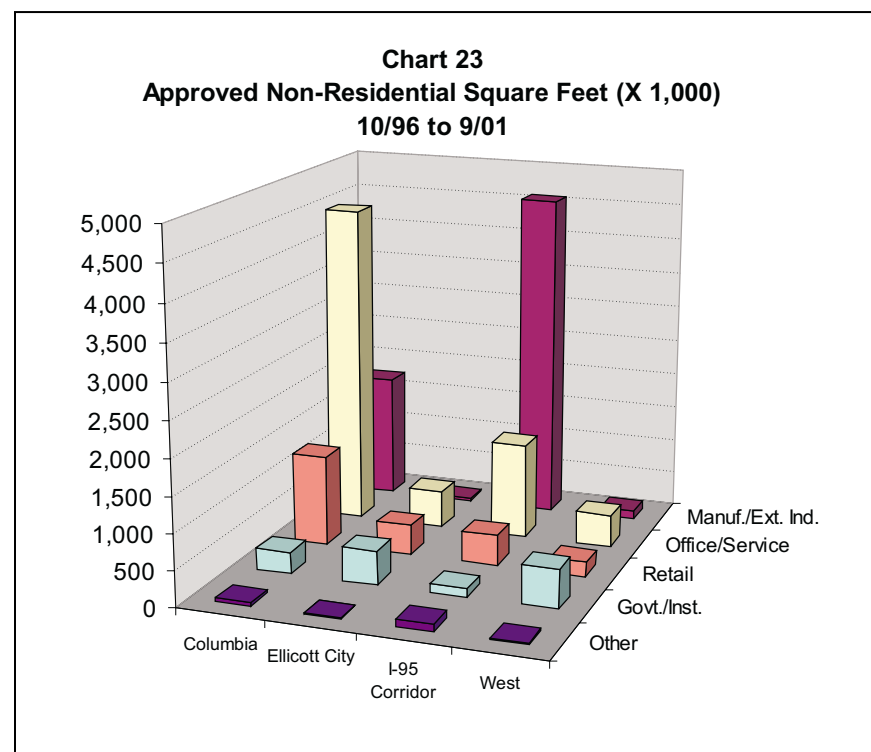


Table 57
Building Square Feet in Approved Non-Residential Site Development Plans, 10/01/96 to 9/30/01

10/96-9/97							10/97-9/98					
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	495,979	324,496	336,596	56,061	19,636	1,232,768	593,619	728,614	1,133,258	54,172	28,348	2,538,011
Ellicott City	114,407	75,464	0	126,651	0	316,522	24,570	0	0	163,811	0	188,381
I-95 Corridor	111,638	28,230	1,177,286	95,738	0	1,412,892	147,173	51,247	218,842	0	86,107	503,369
West	5,349	11,333	0	195,284	5,290	217,256	9,300	216,328	0	0	15,260	240,888
TOTAL	727,373	439,523	1,513,882	473,734	24,926	3,179,438	774,662	996,189	1,352,100	217,983	129,715	3,470,649
PERCENT	22.9%	13.8%	47.6%	14.9%	0.8%	100.0%	22.3%	28.7%	39.0%	6.3%	3.7%	100.0%
10/98-9/99												
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	4,000	1,593,835	58,125	20,157	0	1,676,117	117,171	931,874	56,145	42,465	0	1,147,655
Ellicott City	242,826	169,625	24,250	0	4,663	441,364	26,287	259,259	0	121,705	139	407,390
I-95 Corridor	12,000	54,309	934,540	0	0	1,000,849	115,166	412,006	829,402	0	6,951	1,363,525
West	187,026	56,411	0	45,488	0	288,925	1,722	107,216	113,932	155,502	4,800	383,172
TOTAL	445,852	1,874,180	1,016,915	65,645	4,663	3,407,255	260,346	1,710,355	999,479	319,672	11,890	3,301,742
PERCENT	13.1%	55.0%	29.8%	1.9%	0.1%	100.0%	7.9%	51.8%	30.3%	9.7%	0.4%	100.0%
10/00-9/01												
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL	TOTAL 10/96-9/01					
Columbia	63,728	916,932	153,206	127,111	0	1,260,977	1,274,497	4,495,751	1,737,330	299,966	47,984	7,855,528
Ellicott City	14,555	20,401	0	59,030	139	94,125	422,645	524,749	24,250	471,197	4,941	1,447,782
I-95 Corridor	49,160	796,563	1,421,193	28,352	0	2,295,268	435,137	1,342,355	4,581,263	124,090	93,058	6,575,903
West	2,237	65,930	0	152,185	0	220,352	205,634	457,218	113,932	548,459	25,350	1,350,593
TOTAL	129,680	1,799,826	1,574,399	366,678	139	3,870,722	2,337,913	6,820,073	6,456,775	1,443,712	171,333	17,229,806
PERCENT	3.4%	46.5%	40.7%	9.5%	0.0%	100.0%	13.6%	39.6%	37.5%	8.4%	1.0%	100.0%

1. Includes communications tower, park facilities, storage building, guard house, pumping station, mausoleum expansion and non-employee generating storage space.

In-Process Non-Residential Site Development Plans

This section summarizes non-residential site development plans that are in process. The number of plans, potential lots, acreage and square footage of floor space currently being processed as of September 30, 2001 are tabulated and compared with those in process a year earlier (as of September 30, 2000).

Number of Plans

Countywide, there were 54 non-residential site development plans in process as of September 30, 2001, 17 less than the 71 in process one year earlier (Table 58). All regions had less plans in process this current year compared to last year. As of September 30, 2001, Columbia had the most

plans in process with 18. This is followed by 13 plans in process in the I-95 Corridor, 12 in Ellicott City and 11 in the West.

Number of Lots

Table 59 shows the number of potential non-residential lots in the site development plan process. Results are shown for each year and by development type. Similar to the number of plans, there were less lots in process on September 30, 2001 compared to one year earlier, 65 versus 73, respectively.

The greatest number of the non-residential lots in process for both years were in Columbia. The I-95 Corridor and Ellicott City had the next greatest activity for both years. The West had the least number of lots in process for both years.

As of September 30, 2001, there were 14 government and institutional lots in the site development plan process. There were 13 manufacturing/extensive industrial lots in process, 11 retail lots in process, 10 office/service lots in process and 17 other lots in process.

Table 58
Number of Non-Residential SDP's In Process, 09/30/00 & 09/30/01

Region	2000	2001
Columbia	21	18
Ellicott City	14	12
I-95 Corridor	22	13
West	14	11
TOTAL	71	54

Table 59
Number of Lots in Site Development Plans In Process by Development Type, 09/30/00 & 09/30/01

Region	Retail		Office/Service		Manuf./Ext. Ind.		Govt. & Inst.		Other ¹		TOTAL	
	2000	2001	2000	2001	2000	2001	2000	2001	2000	2001	2000	2001
Columbia	2	3	9	6	1	1	6	4	4	8	22	22
Ellicott City	5	3	4	2	0	0	7	4	0	5	16	14
I-95 Corridor	0	1	3	1	12	11	3	1	3	4	21	18
West	2	4	3	1	1	1	8	5	0	0	14	11
TOTAL	9	11	19	10	14	13	24	14	7	17	73	65

1. Includes mass grading, paved surfaces, athletic fields, parks and open space.

Number of Acres

There were a total of 1,183 acres of non-residential land in the site development plan process as of September 30, 2001 (Table 60). This compares to a slightly larger amount of 1,259 acres in process the previous year. For the current year most of the acreage is in the I-95 Corridor (465 acres including 328 acres for the Chase quarry). This is followed by Columbia with 325 acres (including 118 acres for athletic fields at the Howard County Community College), Ellicott City with 199 acres and the West with 194 acres.

Table 60
Acreage of Non-Residential SDP's In Process, 09/30/00 & 09/30/01

Region	2000	2001
Columbia	190	325
Ellicott City	87	199
I-95 Corridor	774	465
West	208	194
TOTAL	1,259	1,183

Building Floor Space

Table 61 shows the square footage of non-residential building space by building type in the site development plan process. As of September 30, 2001 there was a little more than a million square feet of building space in the site development plan process. This compares to 2.7 million square

feet in process for the previous year, 1.7 million square feet less.

For both years most of the building space was in the I-95 Corridor. This is followed by planned space in Columbia. Ellicott City and the West had the least amount of planned building space.

As of September 30, 2001, there was about 348,000 square feet of manufacturing/extensive industrial building space in the site development plan process. This is followed by about 261,000 square feet of office/service space, 247,000 square feet of retail space and 190,000 square feet of government and institutional space in process. Chart 25 reflects these results graphically and by region.

Major Projects

Of the total million square feet of non-residential building space in the site development plans process as of September 30, 2001, about 484,000 square feet, 46 percent of the total, were in plans with more than 50,000 square feet. These larger plans are shown in Table 61. The location of these plans are shown on Map 19.

In Columbia, one plan totaling about 100,000 square feet of building space was in process. This is for proposed Home Depot Expo Center. In the I-95 Corridor, there were five larger plans in process, totaling about 332,000 square feet. These plans include development in the Route 1 Business Park, the Maier Industrial Park, Columbia Junction and Dorsey Run Park. A Storage USA facility is also planned in the Corridor.

Table 61
Building Square Feet in In-Process Non-Residential Site Development Plans, 09/30/00 & 09/30/01

Region	Retail		Office/Service		Manuf./Ext. Ind.		Govt. & Inst.		Other		TOTAL	
	2000	2001	2000	2001	2000	2001	2000	2001	2000	2001	2000	2001
Columbia	10,105	100,908	493,522	139,898	105,850	6,600	121,992	32,273	0	0	731,469	279,679
Ellicott City	107,159	29,711	38,690	37,731	0	0	44,435	106,303	0	0	190,284	173,745
I-95 Corridor	60,000	55,000	369,532	71,389	1,052,983	338,199	28,352	9,940	0	0	1,510,867	474,528
West	11,937	61,161	77,230	11,792	3,000	3,000	176,501	41,855	0	0	268,668	117,808
TOTAL	189,201	246,780	978,974	260,810	1,161,833	347,799	371,280	190,371	0	0	2,701,288	1,045,760

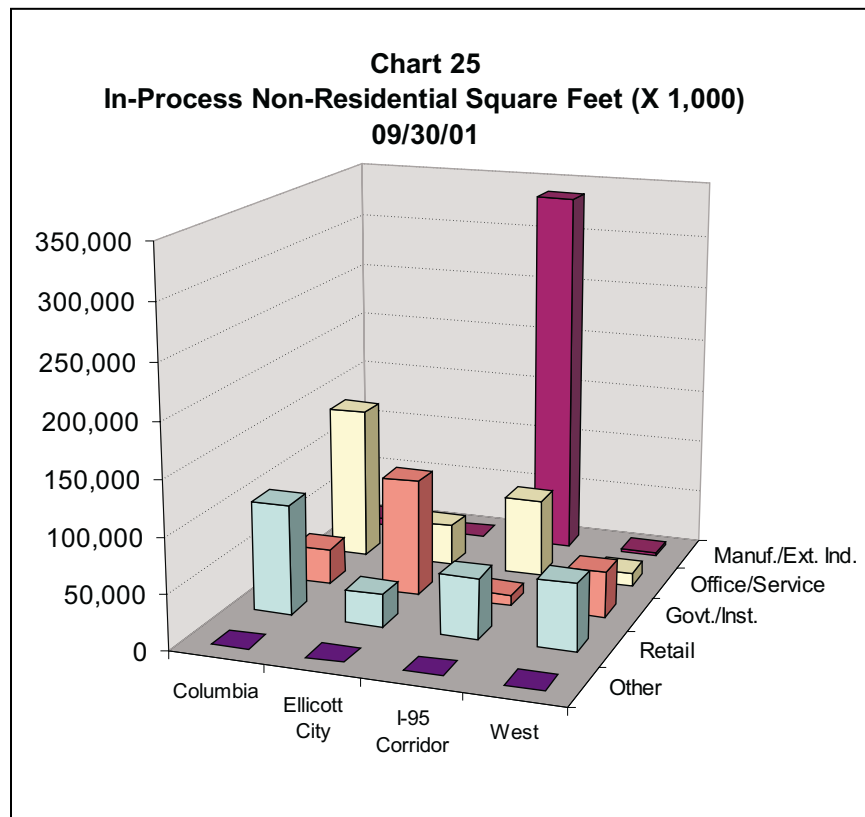
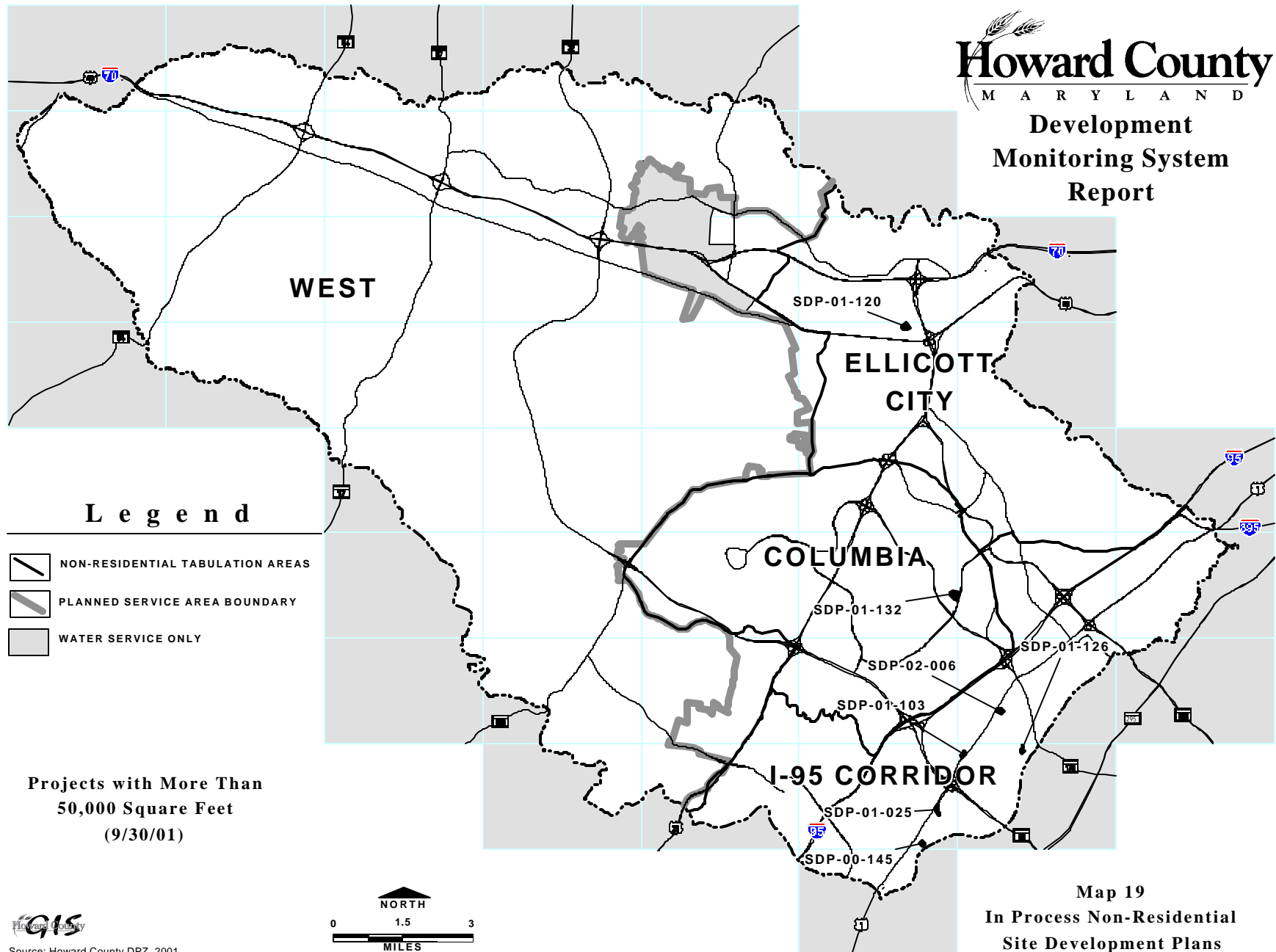


Table 62
Projects With More Than 50,000 Square Feet in In-Process Non-Residential Site Development Plans, 9/30/01

Region	File Number	Plan Name	Use	Building Area	TOTAL
Columbia	SDP-01-132	Route 175 Commercial	Retail-Home Improvement/Retail	100,908	100,908
Ellicott City	SDP-01-120	Church of the Resurrection	Govt & Inst-Church School Expansion	50,382	50,382
I-95 Corridor	SDP-01-025	Storage USA Facility	Manu/Ind-Self Storage Building	91,390	
	SDP-02-006	Route One Business Park	Manu/Ind-Industrial/Office	71,840	
	SDP-00-145	Maier Industrial Park	Manu/Ind-Warehouse/Office	64,000	
	SDP-01-103	Columbia Junction	Retail-Retail Center	55,000	
	SDP-01-126	Dorsey Run Park	Office/Service-Office/Warehouse	50,040	
TOTAL					483,560



Non-Residential Building Permits

The final stage of the development process is the issuance of building permits. As indicated earlier, in Howard County building permits are required for all new construction. This section of the report tabulates building permits for all new non-residential construction. The number of permits issued as well as the associated square footage by building type have been compiled by region.

Summary of Last Year's Results

Last year from October 1, 2000 to September 30, 2001, 145 non-residential building permits were issued for new construction (Table 63). Columbia had the greatest number of issued permits with 49, 34 percent of the total. The I-95 Corridor had 45 issued permits (31 percent). The West and

Ellicott City had 31 and 20 issued permits, respectively.

Countywide, building permits were issued for more than 3.3 million square feet of non-residential space last year. Forty-three percent of this total, about 1.45 million square feet, was for office/service space. Another 1.36 million square feet were for manufacturing/extensive industrial space. There were also permits issued for 399,900 square feet of government and institutional space and 58,174 square feet of retail space (Table 64).

By region, 1.65 million square feet, 49 percent of the total, are in the I-95 Corridor. About 1.1 million square feet are in Columbia and almost 505,000 square feet are in the West. The remaining 105,000 square feet are located in Ellicott City.

Table 63
Issued Non-Residential Building Permits, 10/01/00 to 9/30/01

Region	Number	Percent
Columbia	49	34%
Ellicott City	20	14%
I-95 Corridor	45	31%
West	31	21%
TOTAL	145	100%

Last Year's Permits - Greater Than 50,000 Square Feet

Table 65 shows the major projects of more than 50,000 square feet that were issued building permits last year. These projects amount to slightly more than 1.97 million square feet of space, about 59 percent of the 3.34 million square feet total. About 1.2 million square feet of this space are in the I-95 Corridor, 550,000 square feet in Columbia, 190,000 square feet in the West.

Table 64
Square Feet of Issued Non-Residential Building Permits by Type, 10/01/00 to 9/30/01

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL	PERCENT
Columbia	41,517	780,955	142,504	111,374	0	1,076,350	32%
Ellicott City	6,477	64,269	0	34,408	0	105,154	3%
I-95 Corridor	5,120	454,641	1,116,151	8,690	67,898	1,652,500	49%
West	5,060	151,677	102,539	245,439	0	504,715	15%
TOTAL	58,174	1,451,542	1,361,194	399,911	67,898	3,338,719	100%
PERCENT	2%	43%	41%	12%	2%	100%	

1. Includes non-employee generating storage space, mausoleum addition, & telephone switch building.

Table 65
Building Permits Issued for Major Non-Residential Projects With More Than 50,000 Square Feet, 10/01/00 to 9/30/01

Region	Subdivision	Proposed Use	Square Feet	TOTAL
I-95 Corridor	Troy Hill Corporate Center	Warehouse/Distribution Shell	282,806	1,228,929
	Troy Hill	Construction 1 Story Shell Building Warehouse	166,223	
	Jessup Park Parcel D	Office/Warehouse Shell	158,400	
	Troy Hill	Construction 1 Story Shell Building Warehouse	152,138	
	Dorsey Run Industrial Park	Dorsey Run LLP/Warehouse Shell/Building A	105,000	
	Troy Hill Corporate Center	1 Story Warehouse with Office/Building 1	89,962	
	Lyndwood Square	New 3 Story Office Shell/Building 2	83,352	
	Lyndwood Square	New 3 Story Office/Building A	83,325	
	Troy Hill Corporate Center	New 1 Story Office/Distribution Shell/Building 3	54,096	
	Troy Hill Corporate Center	Shell 1 Story Office/Warehouse	53,627	
Columbia	Connell Property	EZ Storage Corporation/Storage-Warehouse	131,275	551,084
	Columbia Gateway	New 5 Story Office Shell Building	127,635	
	Village Of Owen Brown	Shell/Office	88,808	
	Howard County General Hospital	Emergency Room Addition	80,274	
	Columbia Gateway	Building A/2 Story Office Building	66,742	
	Columbia Gateway	New Shell Building/Building J	56,350	
West	Reservoir High School	School & Foundation Only B00130023	128,752	190,173
	Alternative Learning Center	Alternative Learning Center - HCPSS	61,421	
TOTAL				1,970,186

Permits of more than 100,000 square feet include projects in Troy Hill, Jessup Park, Dorsey Run Industrial Park and Columbia Gateway. The new Reservoir High School in Fulton was also more than 100,000 square feet. Map 20 shows the locations of these larger projects.

Five Year Results

Over the last five years from October 1, 1996 to September 30, 2001, 1,013 non-residential building permits were issued for new construction (Table 66). This is an average of about 203 permits per year. Over the five year period Columbia had the greatest number of issued permits with 463, about 46 percent of the total. The I-95 Corridor had 247 issued permits (24 percent). Ellicott City and the West had 154 and 149 issued permits, about 15 percent of the total each.

Table 67 summarizes the square footage in issued building permits by development type for each of the last five years. The five year total is also shown in the bottom right hand corner of the table. For the five year period, building permits for about 15.9 million square feet of non-residential space have been issued in the County. This is an average of about 3.2 million square feet per year.

Of this total, almost 42 percent or 6.65 million square feet are for office/service space. About 36 percent or 5.76 million square feet are for manufacturing/extensive industrial space. Retail space accounts for about 13.7 percent of the total with about 2.2 million square feet. Government and institutional uses account for 7.7 percent of the total (1.22 million square feet). The remaining 0.8 percent (130,000 square feet) are for other uses.

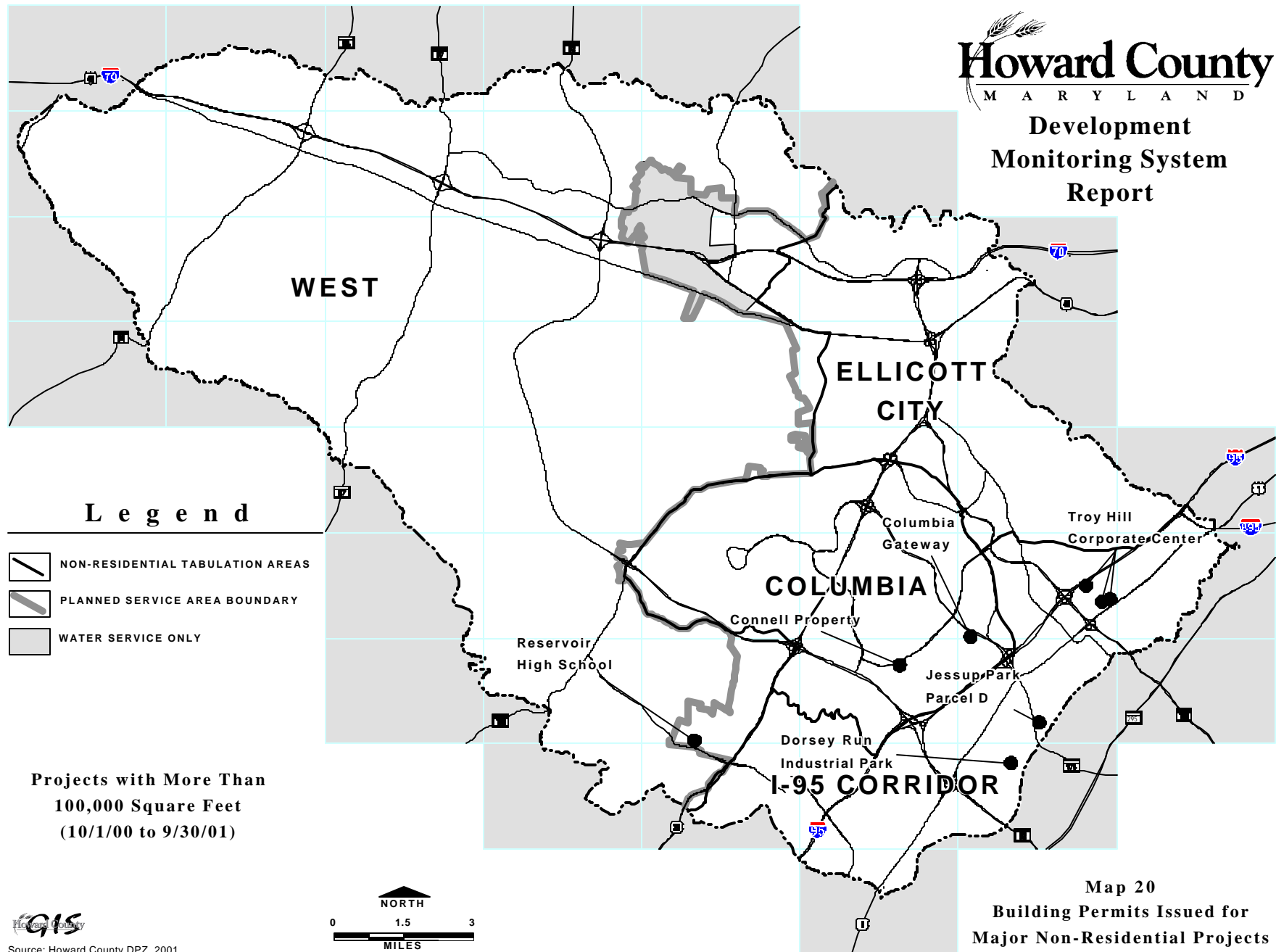


Table 66
Issued Non-Residential Building Permits, 10/01/96 to 9/30/01

Region	10/96-9/97	10/97-9/98	10/98-9/99	10/99-9/00	10/00-9/01	TOTAL	PERCENT
Columbia	123	133	77	81	49	463	46%
Ellicott City	41	32	29	32	20	154	15%
I-95 Corridor	61	60	48	33	45	247	24%
West	17	25	41	35	31	149	15%
TOTAL	242	250	195	181	145	1,013	100%

Chart 26 graphically shows the countywide square footage by development type for each of the five years. It is clear that the amount of annual new office/service space has grown since 1996. There has also been large amounts of manufacturing/extensive industrial square footage in issued building permits over the five year period. This is followed by retail space, government and institutional space and other uses, respectively.

Chart 27 shows the five year square footage total by development type by region. It is apparent that most of the development over the last five years is for manufacturing/extensive industrial and office/service uses. Furthermore, it is clear that most of the manufacturing/extensive industrial development is in the I-95 Corridor and most of the office/service development is in the Columbia region. Columbia also has the most retail development, followed by Ellicott City.

Chart 28 shows the total non-residential square footage in issued building permits over time for each region. For most years, Columbia and the I-95 Corridor had the most development, followed by Ellicott City and the West.

Chart 26
Non-Residential Square Feet - Building Permits (X 1,000)

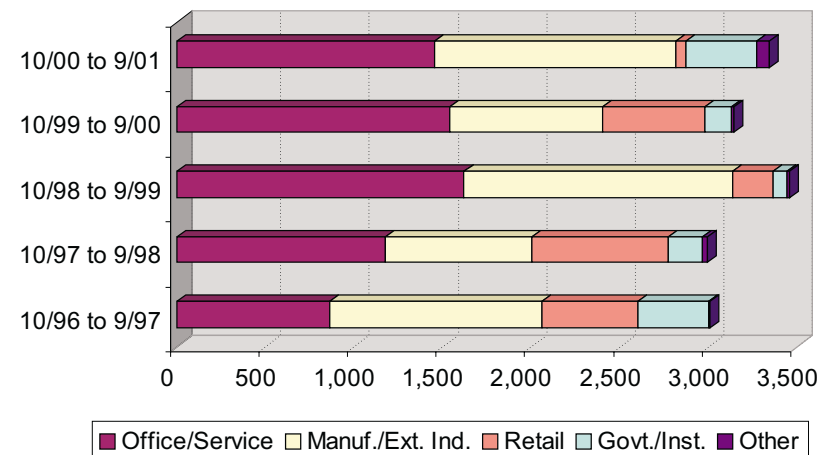


Table 67
Square Feet of Issued Non-Residential Building Permits by Type, 10/01/96 to 9/30/01

10/96 to 9/97							10/97 to 9/98					
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	427,274	370,713	140,991	68,598	4,011	1,011,587	531,784	904,223	103,549	0	28,150	1,567,706
Ellicott City	37,007	90,704	0	175,269	1,020	304,000	116,002	0	0	94,511	0	210,513
I-95 Corridor	59,496	382,676	1,056,441	77,028	0	1,575,641	110,316	111,781	720,951	5,700	0	948,748
West	11,513	16,366	5,010	82,322	0	115,211	13,752	161,280	0	91,770	0	266,802
TOTAL	535,290	860,459	1,202,442	403,217	5,031	3,006,439	771,854	1,177,284	824,500	191,981	28,150	2,993,769
PERCENT	17.8%	28.6%	40.0%	13.4%	0.2%	100.0%	25.8%	39.3%	27.5%	6.4%	0.9%	100.0%

10/98 to 9/99							10/99 to 9/00					
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	99,515	1,307,173	95,230	31,179	13,334	1,546,431	189,341	1,099,040	82,805	28,579	7,276	1,407,041
Ellicott City	52,402	113,179	24,250	0	0	189,831	207,918	164,672	0	116,731	613	489,934
I-95 Corridor	47,074	162,882	1,391,075	0	2,926	1,603,957	56,090	183,021	779,952	4,340	1,280	1,024,683
West	33,064	38,675	0	45,728	0	117,467	125,007	90,146	0	0	3,864	219,017
TOTAL	232,055	1,621,909	1,510,555	76,907	16,260	3,457,686	578,356	1,536,879	862,757	149,650	13,033	3,140,675
PERCENT	6.7%	46.9%	43.7%	2.2%	0.5%	100.0%	18.4%	48.9%	27.5%	4.8%	0.4%	100.0%

10/00 to 9/01							TOTAL 10/96 to 9/01					
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	41,517	780,955	142,504	111,374	0	1,076,350	1,289,431	4,462,104	565,079	239,730	52,771	6,609,115
Ellicott City	6,477	64,269	0	34,408	0	105,154	419,806	432,824	24,250	420,919	1,633	1,299,432
I-95 Corridor	5,120	454,641	1,116,151	8,690	67,898	1,652,500	278,096	1,295,001	5,064,570	95,758	72,104	6,805,529
West	5,060	151,677	102,539	245,439	0	504,715	188,396	458,144	107,549	465,259	3,864	1,223,212
TOTAL	58,174	1,451,542	1,361,194	399,911	67,898	3,338,719	2,175,729	6,648,073	5,761,448	1,221,666	130,372	15,937,288
PERCENT	1.7%	43.5%	40.8%	12.0%	2.0%	100.0%	13.7%	41.7%	36.2%	7.7%	0.8%	100.0%

1. Includes communication towers, utility buildings, country club, guard house, mausoleum, pool house, pumping station, and non-employee generating storage space.

Chart 27
Non-Residential Square Feet - Building Permits
(X 1,000) 10/96 to 9/01

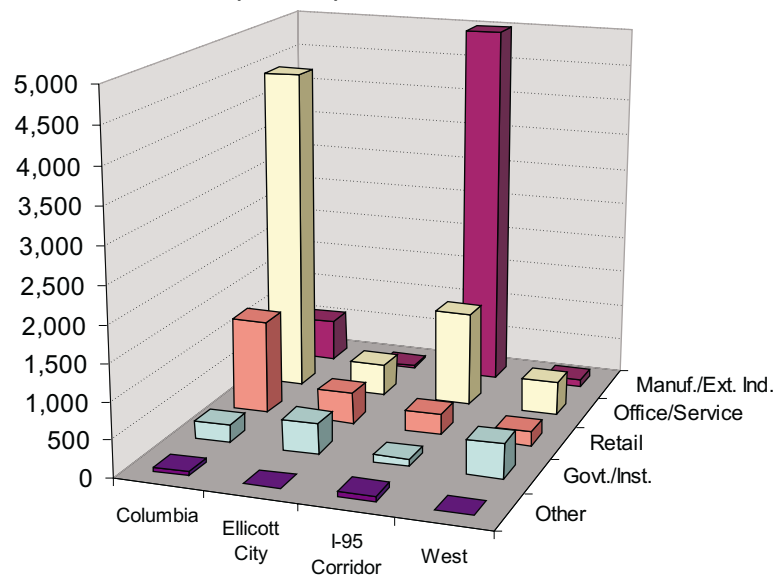
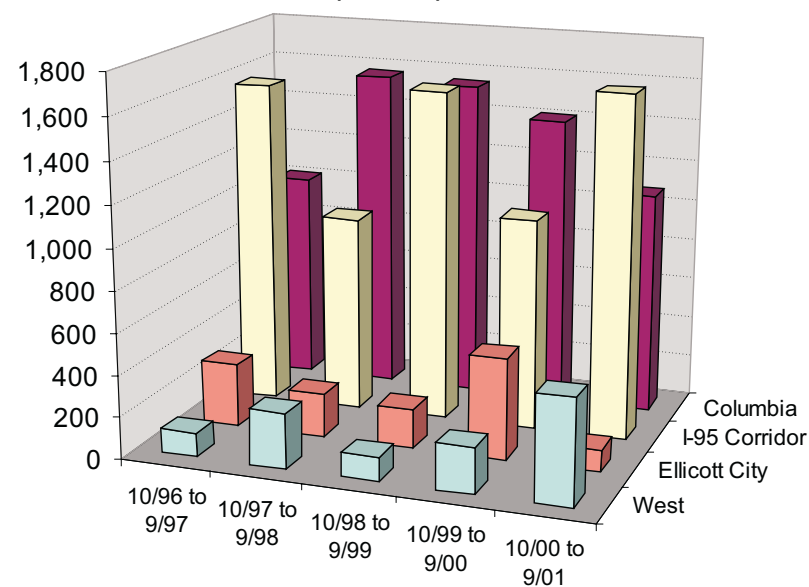


Chart 28
Non-Residential Square Feet - Building Permits
(X 1,000)



Employment Estimates

To estimate employment several steps were taken. First, employment estimates as indicated on site development plans were used. If this was not available, then employment was estimated based on the standard square feet per employee factors shown in Table 68. These factors are multiplied times the square footage of planned building space which is included on site development plans and building permits. In some cases, particularly for government and institutional uses and schools and religious facilities, owners or representatives of the property were contacted to determine potential employment.

Table 68
Square Feet per Employee Standard Factors

Type of Space	SF/Emp.
Retail	400
Office/Service	250
Manufacturing/Extensive Industrial	1,000
Government & Institutional	250

The first section below estimates employment potential from site development plans. This is followed by an estimate from building permits. The last section discusses estimated actual employment changes as reported by the State Department of Labor, Licensing, and Regulation and the U.S. Bureau of Economic Analysis.

Estimated Employment from Site Development Plans

Last Year's Results

Space in site development plans approved last year from October 1, 2000 to September 30, 2001 could accommodate an estimated 9,072 employees (Table 69). About 51 percent of the potential jobs are located in the I-95 Corridor, where they are mostly office/service jobs. About 44 percent of

Table 69
Potential Employment from Approved Non-Residential SDP's
By Use Category, 10/01/00 to 9/30/01

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Sch. & Rel. Facilities	TOTAL	PERCENT
Columbia	39	3,663	153	100	38	3,993	44%
Ellicott City	36	82	0	5	9	132	1%
I-95 Corridor	104	3,048	1,408	0	55	4,615	51%
West	6	221	0	70	36	332	4%
TOTAL	185	7,013	1,561	175	138	9,072	100%
PERCENT	2%	77%	17%	2%	2%	100%	

the potential jobs are in Columbia, also mostly office jobs. About 4 percent of the jobs are in the West and 1 percent are in Ellicott City.

Countywide, 7,013 potential jobs, or about 77 percent of the total, are office/service jobs. This is followed by 17 percent manufacturing/extensive industrial jobs, and 2 percent each for retail, government and institutional, and schools and religious facilities jobs.

Five Year Results

Tables 70 and 71 show the potential employment from approved site development plans over the last five years, from October 1, 1996 to September

Table 70
Potential Employment from Approved Non-Residential SDP's
By Use Category, 10/01/96 to 9/30/01

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Sch. & Rel. Facilities	TOTAL	PERCENT
Columbia	2,348	14,315	847	180	71	17,761	52%
Ellicott City	1,382	1,479	1	421	170	3,453	10%
I-95 Corridor	731	4,917	4,357	0	150	10,155	30%
West	518	1,707	0	92	319	2,635	8%
TOTAL	4,979	22,417	5,205	693	710	34,004	100%
PERCENT	15%	66%	15%	2%	2%	100%	

Table 71
Potential Employment from Approved Non-Residential Site Development Plans

Region	10/96 to 9/97	10/97 to 9/98	10/98 to 9/99	10/99 to 9/00	10/00 to 9/01	TOTAL	PERCENT
Columbia	2,235	3,374	4,198	3,961	3,993	17,761	52%
Ellicott City	763	209	872	1,477	132	3,453	10%
I-95 Corridor	1,439	717	1,025	2,359	4,615	10,155	30%
West	193	813	643	654	332	2,635	8%
TOTAL	4,630	5,113	6,738	8,451	9,072	34,004	100%
PERCENT	14%	15%	20%	25%	27%	100%	

30, 2001. Over the five year period, the total comes to 34,004 new jobs, an average of 6,800 jobs per year. Table 71 shows that there has been a steady increase in new jobs annually based on approved SDP's since 1996, ranging from 4,630 in 96/97 to 9,072 in 00/01.

Similar to the one year results, the greatest percentage of the jobs are located in Columbia with 52 percent of the total. The I-95 Corridor has 30 percent of the total, followed by 10 percent in Ellicott City and 8 percent in the West. Most of the new jobs are office/service jobs followed by manufacturing/extensive industrial jobs and then retail jobs. Jobs for government and institutional and schools and religious facilities comprise only 4 percent of the total.

Estimated Employment from Building Permits

Last Year's Results

An estimated 7,643 new jobs are projected based on issued building permits last year from October 1, 2000 to September 30, 2001 (Table 72). About 45 percent of the potential jobs, mostly office/service jobs, are located in Columbia. About 39 percent of the jobs are in the I-95 Corridor. The remaining 12 percent of the jobs are in the West and 4 percent are in Ellicott City.

Countywide, 5,806 potential jobs, or about 76 percent of the total, are office/service jobs. This is followed by 18 percent manufacturing/extensive industrial jobs. The remaining 5 percent are retail, government and institu-

tional, and schools and religious facilities jobs.

Table 72
Potential Employment from Issued Non-Residential Building Permits
By Use Category, 10/01/00 to 9/30/01

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Sch. & Rel. Facilities	TOTAL	PERCENT
Columbia	104	3,124	143	45	29	3,444	45%
Ellicott City	16	257	0	5	18	296	4%
I-95 Corridor	13	1,819	1,116	0	6	2,954	39%
West	13	607	103	68	159	949	12%
TOTAL	145	5,806	1,361	118	212	7,643	100%
PERCENT	2%	76%	18%	2%	3%	100%	

Five Year Results

Tables 73 and 74 show the potential employment from issued building permits over the last five years, from October 1, 1996 to September 30, 2001. Over the five year period, the estimate results in 38,004 new jobs, an average of about 7,600 jobs per year.

As expected, the greatest percentage of the jobs are located in Columbia with about 59 percent of the total. The I-95 Corridor has about 26 percent of the total, followed by 8 percent in the West and 7 percent in Ellicott City. Most of the new jobs are office/service jobs followed by retail jobs and

Table 73
Potential Employment from Issued Non-Residential Building Permits

Region	10/96 to 9/97	10/97 to 9/98	10/98 to 9/99	10/99 to 9/00	10/00 to 9/01	TOTAL	PERCENT
Columbia	2,871	6,141	5,446	4,436	3,444	22,338	59%
Ellicott City	753	449	315	981	296	2,794	7%
I-95 Corridor	1,711	1,675	2,276	1,348	2,954	9,964	26%
West	147	940	208	664	949	2,908	8%
TOTAL	5,482	9,205	8,245	7,429	7,643	38,004	100%
PERCENT	14%	24%	22%	20%	20%	100%	

Table 74
Potential Employment from Issued Non-Residential Building Permits
By Use Category, 10/01/96 to 9/30/01

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Sch. & Rel. Facilities	TOTAL	PERCENT
Columbia	3,955	17,834	304	165	81	22,338	59%
Ellicott City	1,416	1,060	4	96	218	2,794	7%
I-95 Corridor	860	3,599	5,427	7	71	9,964	26%
West	502	1,892	108	90	317	2,908	8%
TOTAL	6,732	24,384	5,842	358	687	38,004	100%
PERCENT	18%	64%	15%	1%	2%	100%	

then manufacturing/extensive industrial jobs. Jobs for the government and institutional and school and religious facilities categories comprise only about 3 percent of the total.

State of Maryland Employment Estimates

The previous sections estimate *potential* employment from new development. This section provides an overview of estimated actual employment changes as reported by the State Department of Labor, Licensing, and Regulation (DLLR). This would include an increase in employment from new development as well as new jobs created in existing building space. The latter would generally reflect a decrease in vacancy rates. It could also be a result of the re-configuration of existing building space resulting in more

jobs per square foot. An example of this is the re-configuration of a warehouse to office use.

DLLR reports statistics produced by Maryland's ES-202 Program. The data are generated and published on a quarterly basis and include all workers covered by the Unemployment Insurance (UI) Law of Maryland and the unemployment compensation for federal employees (UCFE) program. Together these two account for approximately 98 percent of all wage and salary civilian employment. Since wage and salary employment represents approximately 93 percent of total civilian employment, DLLR estimates that their data reflects over 91 percent of all civilian employment. However, a comparison of the State data with federal employment data from the Bureau of Economic Analysis (BEA) shows that about 30 percent of Howard County's employment in 1999 was not reported by the State.

Table 75 shows both DLLR and BEA employment data and the annual increase from 1996 to 2001. BEA data generally has a two year lag time resulting in no available data for 2000 and 2001. Observing the most recent State data, reflecting the first quarter employment data for each year, there has been an average increase of about 6,785 jobs per year for the last five years. Last year, from 2000 to 2001, the State reports that 5,874 new jobs were added in Howard County. This is typically less than what the BEA reports (looking at the available data to 1999), and also less than what is estimated based on SDPs and building permits as discussed earlier.

Tables 76 and 77 show the jobs and average wages by job type as reported

by the State for the first quarter of 2000 and 2001. In the first quarter of 2001, the State reported that there were 130,717 jobs in Howard County with an average weekly wage of \$768. This compares to 124,843 jobs one year earlier with an average wage of \$730. This is net increase of 5,874 jobs and about a 5.2 percent increase in average wages.

Table 75
Jobs in Howard County

Year	DLLR ¹		BEA ²	
	Jobs	Increase	Jobs	Increase
1996	96,793		131,649	
1997	104,920	8,127	140,482	8,833
1998	110,732	5,812	148,450	7,968
1999	117,650	6,918	157,462	9,012
2000	124,843	7,193	NA	NA
2001	130,717	5,874	NA	NA
Average		6,785		

1. Maryland State Department of Labor, Licensing and Regulation
(1st quarter employment)

2. U.S. Bureau of Economic Analysis (annual employment)

Table 76
Jobs and Wages by Industry, 2000 and 2001¹

Job Type	2000		2001	
	Jobs	Avg. Wage	Jobs	Avg. Wage
Government				
Federal	760	\$971	763	\$1,105
State	3,744	\$769	3,876	\$792
Local	10,074	\$667	11,053	\$670
Subtotal/Average	14,578	\$709	15,692	\$722
Private				
Contract Construction	9,385	\$857	Categories Not Comparable (See Table 77 for new categories)	
Manufacturing	7,974	\$841		
Trans, Comm, Utilities	6,461	\$813		
Wholesale Trade	11,850	\$989		
Retail Trade	24,477	\$374		
FIRE	5,877	\$1,101		
Services	42,536	\$766		
Other	1,705	\$507		
Subtotal/Average	110,265	\$733	115,025	\$775
TOTAL	124,843	\$730	130,717	\$768

1. State Department of Labor, Licensing and Regulation (1st quarter employment)

Table 77
Private Sector Jobs and Wages by Industry, 2001¹

Job Type	2001	
	Jobs	Avg. Wage
Goods Producing		
Natural Resources and Mining	269	\$410
Construction	11,465	\$909
Manufacturing	8,658	\$888
Subtotal/Average	20,393	\$893
Service Providing		
Trade, Transportation, and Utilities	34,545	\$715
Information	2,289	\$1,166
Financial Activities	6,869	\$1,119
Professional and Business Services	24,385	\$971
Education and Health Services	11,647	\$603
Leisure and Hospitality	10,588	\$261
Other Services	4,188	\$553
Subtotal/Average	94,511	\$750
Unclassified	122	\$536
TOTAL	115,025	\$775

1. State Department of Labor, Licensing and Regulation (1st quarter employment)

Howard County Department of Planning and Zoning
3430 Court House Drive
Ellicott City, MD 21043
(410) 313-2354